WEST KOOTENAY/ REVELSTOKE

DESTINATION DEVELOPMENT

SITUATION ANALYSIS

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CONTACTS

Destination BC Representatives:

Alison McKay
(604)-660-3754
Alison.mckay@destinationbc.ca

Kootenay Rockies Tourism Association:

Emilie Cayer-Huard
(250)-427-4838 ext. 206
Emilie@kootenayrockies.com

Ministry of Jobs, Tourism and Skills Training representative:

Amber Crofts
(250) 356-1489
Amber.Crofts@gov.bc.ca

Destination BC Facilitator:

Suzanne Denbak
(604)-905-9678
sdenbak@cadencestrategies.com

EXECUTIVE SUMMARY

Background and Purpose

Destination BC is offering destination development planning assistance to support the ongoing viability of BC's tourism sector. The Destination Development Program (Program) is a critical part of Destination BC's corporate strategy and will facilitate the collaboration of local, regional and provincial agencies, First Nations, destination marketing organizations (DMOs), tourism operators and other community interests to guide the long-term growth of tourism experiences and revenues.

Destination development is all about bringing together planning, policy and capacity building efforts to:

- Ensure that a destination is well positioned to make future strategic decisions;
- Address impediments to growth and capitalize on opportunities;
- Outline key assets of a destination including the main product themes/experiences available;
- Outline key priorities for new product, infrastructure and amenity development; and
- Identify impediments to development and tourism growth (e.g. potential policy or capacity issues, available funding, access to funding etc.)

The benefits of destination development include:

- Creation of a clear 'road-map' for the destination;
- Leveraging the strength of the destination as seen by the visitor;
- Identifying opportunities and challenges to tourism growth;
- Establishing a joint vision that will direct development activity in a range of areas;
- Establishing priorities and align investments to grow the visitor economy; and
- Establishing the basis for joint action and inter-community dialogue.

Planning Area

The West Kootenay/Revelstoke planning area stretches from Rossland/Trail/Castlegar in the west to Revelstoke in the north and Creston in the east. The southern boundary is the US border. It includes the communities of Revelstoke, Nakusp, New Denver, Silverton, Slocan, Kaslo, Creston, Nelson, Castlegar, Salmo, Rossland, Trail, Montrose, Fruitvale, Warfield, and all areas of the Regional District of Central Kootenay, Areas A and B of the Regional District of Kootenay Boundary and Area A of the Columbia Shuswap Regional District.

The West Kootenay/Revelstoke planning area is within the Traditional Territory of the Ktunaxa Nation which includes the Ktunaxa Nation Council, with central government offices located in Cranbrook, and the following communities located in Canada (two additional communities are located south of the 49th parallel):ʔakisq̓nuk First Nation in Windemere; ʔakink̓umǂasnuqǂiʔit (Tobacco Plains Indian Band) in Grasmere, ʔaq̓am (St. Mary's Indian Band) near Cranbrook; and yaqan nuykiy (Lower Kootenay Indian Band) near Creston).

The Sinixt First Nation (Arrow Lakes people), although declared extinct by the Federal government in 1956 are currently pursuing a reversal of this decision. Sinixt Traditional Territory also includes the West Kootenay/Revelstoke planning area.

Secwepemc and Okanagan indigenous peoples also indicate Traditional Territory interests within the West Kootenay/Revelstoke planning area

Tourism and recreation opportunities as well as amenity migration have begun to shift the dependence from a resource based to a more diversified economy. Alongside tourism, forestry, mining and agriculture remain important sectors. There is also a significant service sector that includes health and education in the planning area. Recently the number of technology-based companies choosing the West Kootenay/Revelstoke area as their base of operations has increased. The MIDAS Centre in Trail recently opened offering the latest digital fabrication technology and is open to the public through membership.

Columbia Power and the Columbia Basin Trust have a long history and partnership in the planning area. Columbia Power's role is to develop, build and operate these projects on behalf of the partnership. Income from these projects is distributed equally to the Trust and Columbia Power. The Trust uses its income to support efforts by residents of the region to create social, economic and environmental well being in the Basin. Columbia Power uses the income to reinvest in project development, including Waneta Expansion, currently under construction and pay dividends to its shareholder, the Province of BC. Columbia Basin Trust reported in July, 2016 that it had delivered $31 million in funding to projects in the last year. CBT has thirteen strategic priorities many of which align well with destination development.

Traditional major winter attractions for the area are its access to 'epic powder' including downhill skiing, snowmobiling, backcountry touring in the resorts and surrounding areas in Revelstoke (Revelstoke Mountain Resort), Rossland (Red Mountain Resort), Nelson (Whitewater Ski Resort), Slocan Valley/Nakusp/Valhalla Provincial Park and the heli and cat skiing at one of many backcountry operators. There are five cat ski companies in the Nelson Kootenay Lake/Slocan Valley area (Baldface, Selkirk Snowcat Skiing, Retallack, White Grizzly and Valhalla Powder Cats) making this region the Cat Ski Capital of the World. Big Red Cats operates near Rossland. Cat skiing and heli skiing are also available in Revelstoke (Revelstoke Catskiing, Mustang Powder, K3 Snowcats). Throughout the planning area there are extensive networks of Nordic groomed trails maintained by local clubs.

In spring/summer/fall, the combination of Provincial and National parks and associated trail systems offers excellent camping and hiking opportunities. This network of trails include 'rail trails', boardwalks as well as more adventurous multi-night backcountry routes. Mountain biking has grown in popularity in recent years with rides like the Seven Summits in Rossland achieving 'epic' status from IMBA (International Mountain Biking Association). Alpine climbing/cragging/bouldering enthusiasts can find many great spots. There is abundant freshwater in the planning area as well that has drawn generations of visitors for summer vacations 'at the lake' as well as those who seek to paddle, kayak, standup paddleboard or experience whitewater runs.

Hunting and angling are also pursued by many locals and visitors with angling opportunities throughout the many lakes and rivers in the planning area.

Hotsprings are also a significant attraction and draw visitors to the area with a range of rustic, backcountry and developed options in places like Halcyon, Nakusp and Ainsworth Hot Springs. The planning area also benefits from a signficant artistic community, interesting heritage attractions, many festivals/events and the ever present 'Kootenay vibe'.

The West Kootenay/Revelstoke planning area is accessible by air and by car. Visitors arriving by air will fly to Cranbrook, to Castlegar or to Trail. Pacific Coastal has also launched winter service to Revelstoke. The closest US airport is in Spokane. Travel by road is scenic and draws motorcycle and sportcar touring (Hwy #31A is a premier route) as well as RV's and trailers. Cycle touring is also popular. The primary east-west highway is Highway #3 in the south. Revelstoke is situated on the TransCanada Highway #1 in the north. North/south connections include use of inland ferries at Kootenay Bay-Balfour and Shelter Bay – Galena Bay. There are visitor centres in most communities in the planning area that provide visitor information, assistance and advice.

Tourism Industry Context (Trends and Management Structure)

- Tourism is one of the largest and fastest-growing economic sectors in the world. 2015 was no exception, with international tourists arrivals (ITAs) growing 4.4% over 2014 to reach 1,184 million. Long-term, continued growth is expected over the next two decades. According to the UNWTO's Tourism Towards 2030, global ITAs are expected to increase by an average of 3.3% per year from 2010 to 2030.

- Over the past decade, there has been steady growth in the economic performance of the Canadian tourism industry. Tourism is Canada's top service export, although Canada has not kept pace with its competitors. Canada's market share of global international tourism arrivals has declined from 2.9% in 2000 to 1.5% in 2014. Further, although Canada remains amongst the top twenty most-visited countries, in terms of international visitor arrivals it has slipped from 8th place in 2000 to 17th in 2013.

- The tourism industry continues to play a significant role in the BC economy. In 2014, the BC tourism industry generated $14.6B in revenue, a 5% increase from 2013, and a 38% increase over 2004. Also, the tourism industry contributed $7.1 billion of value added to the BC economy, as measured through GDP (in 2007 constant dollars). This represents 4.5% growth over 2013 and 13.1% growth since 2007. A total of 127,500 people were employed in tourism-related businesses, a 2.2% increase over 2013 and an 18.4% increase since 2004.

- More recent BC tourism performance indicators showed that 2015 was an exceptional year of growth. There was an increase of 8% in total overnight international visitor arrivals due to strong growth from the United States (10%) and moderate growth from Asia/Pacific (5%) and Europe (4%).

- Over the past decade, there have been substantial shifts in the tourism marketplace that have resulted in the growing importance of the delivery of outstanding travel experiences. High satisfaction with travel experiences is critical to achieve increased visitor spending, longer stays, repeat visits and positive word of mouth referrals. Destination advocacy, either face-to-face or through electronic media, is critical to attract first time visitors to British Columbia. On-going product development is key within destination development to ensure that iconic experiences meet and ideally exceed, visitor expectations.

- To address some of these consumer shifts, the tourism system in BC has adapted. These changes include:
    - BC's tourism system is evolving to become more aligned in both destination development, marketing and use of the BC destination brand;
    - New roles for the regional tourism organizations and business advisors with an increased focus on destination development.
    - An increased number of 2% tax funded communities through the Municipal and Regional District Tax (MRDT). Increase of allowable MRDT tax from 2% to 3%, which may inject an additional $10 million to $20 million into the tourism system (currently ~ $38 million collected by over 50 MRDT communities in BC);[1]
    - Increasing use of Net Promoter Score® (NPS®) to measure the intention to recommend/refer a travel destination, organization or sector. Destination BC has identified NPS drivers as a common provincial goal.
    - Assisting tourism businesses to evolve their offerings and meet and exceed guest needs and expectations through the development of remarkable experiences.
    - A strong focus on destination development throughout the province through collaborative, integrated planning and coordination that leads to enhanced tourism economic growth.

[1] Source: Destination BC

West Kootenay/Revelstoke Performance and Market Analysis

The value of the West Kootenay/Revelstoke tourism economy has not been measured. Similarly, there are few indicators available to measure performance of the tourism industry at a local level. In 2012, the entire Kootenay Rockies tourism region received 9% of provincial overnight visitation (1.8 million person visits) and 7% of related spending ($602 million).[2] One of the few quantitative measures that is available is accommodation revenues upon which the MRDT is collected as reported by BC Stats http://www.bcstats.gov.bc.ca/Files/c071216f-989d-42ea-9a8c-f68e885274ec/TourismRoomRevenue.xlsx.

Room Revenues ($millions)

Community	2010	2011	2012	2013	2014	2015
Nelson-Castlegar-Rossland	$11.377	$13.189	$14.062	$15.031	$17.687	$23.145
Revelstoke	$15.724	$17.284	$20.105	$21.938	$24.072	$27.069

In 2016, the Resort Municipality Initiative Resort Collaborative commissioned a review of the economic contributions of the 14 Resort Communities in the Province. This study by Cadence Strategies and Pacific Analytics utilized input/output modelling to estimate tourism revenues, gross domestic product, employment and total tax contributions. Both Revelstoke and Rossland participated in the study with contributions as follows[3]:

Revelstoke – Economic Impacts – 2015 ($millions)

Economic Measure – 2015	Direct in Revelstoke	Indirect	Induced	Regional Total	Rest of BC Total	Total Impacts, BC
Tourism Revenue/Spending	$121.9					
Gross Domestic Product	$43.1	$2.4	$4.9	$50.4	$41.8	$92.2

[2] Source: Destination BC Kootenay Rockies Regional Profile (2014)

[3] RMI Funding – Building on Success – September 2016 prepared by Cadence Strategies/Pacific Analytics for the Resort Municipality Initiative Resort Collaborative

Employment (FTE's)	927.3	31.1	25.2	983.6	505	1488.6
Total tax contribution	$23.4	$0.9	$0.8	$25.2	$8.6	$33.8

Rossland – Economic Impacts – 2015 ($millions)

Economic Measure – 2015	Direct in Rossland	Indirect	Induced	Regional Total	Rest of BC Total	Total Impacts, BC
Tourism Revenue/Spending	$13.0					
Gross Domestic Product	$5.0	$0.2	$0.5	$5.8	$4.5	$10.3
Employment (FTE's)	106	3.3	2.7	112	53.6	165.6
Total tax contribution	$2.5	$0.1	$0.1	$2.7	$0.9	$3.6

Similar to many areas in BC, the West Kootenay/Revelstoke planning area experiences significant increases in visitation and tourism revenues in the the summer months. Winter visitation is supported by the area's reputation for powder snow and its ski resort offerings and backcountry access.

The West Kootenay/Revelstoke planning area's largest visitor base is the BC and AB residents. European travellers are typically the third largest area of origin as reported by Visitor Centres throughout the planning area.

West Kootenay/Revelstoke Destination Assessment

There are currently multiple iconic demand generators and an abundance of additional experiences with potential to further increase the visitor interest for travelling to the West Kootenay/Revelstoke planning area. However, as a relatively remote destination with visitor volumes that allow most businesses to survive rather than flourish, there are gaps in it's experiential offerings to visitors. The ability to address these gaps is compounded by resource challenges - a relatively small population with limited financial and human resource capacity.

There are clusters of tourism experiences that have succeeded in creating a critical mass of remarkable experiences that motivate travel to these destinations – Revelstoke, Nelson, Rossland are examples of the kind of year round tourism success that is possible in the West Kootenay/Revelstoke planning area. However, between these destinations are rural areas that are struggling to secure a level of visitation that can support business viability. There are isolated successful operations such as Retallack between Nakusp and Kaslo, and Ainsworth Hot Springs and pockets that benefit from intense summer visitation (Kaslo, New Denver) but for other businesses and communities, destination development should consider opportunities for collaboration and leveraging to create collections of experiences that combine to offer a scope and scale necessary to motivate travel.

Some of the key areas to be addressed in the development of the destination development plan for the West Kootenay/Revelstoke planning area include:

- Enhanced collaboration and cooperation amongst all public and private stakeholders to ensure efforts across industries are focused on optimal use of resources and to ensure that efforts within the tourism sector are focused on 'growing the tourism pie' for the benefit of all rather than competing internally.

- Reliable access for visitors to the planning area is essential. Large urban population centres are a significant distance away (Vancouver and Calgary are both 7-8 hours drive). Road safety and road maintenance (particularly in winter) on all routes is fundamental to success. As travellers consider alternate, 'green' modes of travel, road shoulder widening for bicycles and electric vehicle charging stations should be considered. Air access should be convenient, reliable and affordable. Appropriate seasonal capacity and reliability of the inland ferries in the planning area will support destination success.

- Ease of movement and connectivity *within* the planning area is also important for visitors. Shuttle services between airports and destinations, between towns and nearby attractions/activities and between communities will enhance the density of visitor experiences that can be readily accessed and thereby enhance the appeal of the destination.

- There is significant opportunity to fill capacity in the shoulder season and increase the utilization of existing and planned infrastructure and assets. The destination needs to overcome multiple hurdles in order to be a true, four-season destination, including offering consistent business hours in existing operations and providing additional, attractive year-round activities and services, some of which are weather-independent to support spring/autumn visitation.

- Due to the diversity of outdoor adventure activities, there are numerous potential issues that could curtail growth in any one area. Potential barriers include land access challenges (use/maintenance of resource roads, tenure of other sectors like forestry/mining as well as potential conflicts between public/commercial use, motorized and non-motorized use), and other government regulatory requirements related to use of reservoirs, access to dyking districts etc.

- The current strength of outdoor activities and potential for growth must be balanced with the natural carrying capacity of the affected land and water-based ecosystems to ensure that the very factors that attract visitors are not undermined and that long-term environmental sustainability is considered throughout destination development.

- Many of these outdoor activities rely on networks of trails – the rationalization and/or expansion of trail networks must be considered strategically across communities alongside potential links and connections between communities bearing in mind the need to legalize trails and then maintain them to appropriate standards given limited resources/volunteer time to do so.

- Signage and wayfinding strategies are needed in the front, mid and backcountry as many of the planning area's experiences are currently difficult to locate and navigate.

- Significant opportunity exists to enhance the Aboriginal cultural product and experience and the visible presence of First Nations in their traditional territories.

- The West Kootenay/Revelstoke planning area has a growing depth of arts and culture offerings (East Shore of Kootenay Lake artisans, Nelson as a cultural hub, Castlegar Sculpturewalk etc.). This is complimented by intriguing heritage interpretation (Trail's Italian heritage, Castlegar's Doukhobour history, the Sandon ghost town, New Denver Nikkei Internment Memorial Centre). However, destination success requires that these experiences collaborate and cooperate to create a depth and density that will motivate travel.

- Similarly the planning area has a growing agriculture, agri-tourism, culinary scene (craft breweries, locally sourced, organic menus etc.) but these experiences individually are to isolated and limited to truly contribute to destination growth. Again, collaboration and cooperation to create a depth and density of experiences to motivate travel is needed.

- There are many existing festivals and events, however the roster across communities is not well coordinated creating conflicts around dates. Many events are at capacity, in terms of footprint, resources and volunteer capacity. Yet there is significant potential particularly to enhance shoulder season visitation from festivals and events, and support the strengths of the destination as well as benefits for residents.

- There are significant human resource challenges that need to be addressed, including access to adequate, skilled staff, affordable training programs to enhance skill levels and an inventory of affordable housing in which staff or fledging entrepreneurs can live. All of these factors are critical elements to business success and the ability to enhance the visitor experience.

- Lack of sufficient business support (or lack of knowledge about the support that is available) is considered a significant constraint to tourism growth. Business support includes guiding through local/Provincial government processes and approvals, mentoring, business planning, grant application assistance, provision of seed capital, etc.

1. INTRODUCTION

1.1 Program Overview

Destination BC is offering destination development planning assistance to support the ongoing viability of BC's tourism sector. The Destination Development Program (Program) is a critical part of Destination BC's corporate strategy and will facilitate the collaboration of local, regional and provincial agencies, First Nations, destination marketing organizations (DMOs), tourism operators and other community interests to guide the long-term growth of tourism experiences and revenues.

The Program will provide strategic direction to address two fundamental needs of BC's tourism industry:

- Increase tourism to BC's communities by improving their attractiveness as 'destinations' for visitors, and,
- Align tourism development efforts of individual communities and regions with a provincial strategy to avoid duplication of effort, improve impact and increase the effectiveness of all tourism investments.

Destination BC has completed extensive consultation to gather input into the program and the process, including from across the Provincial Government and regional tourism associations and business advisors. It has been designed to be fueled by consumer insights and behaviors, to consider the unique needs of the tourism regions, while using a semi-standardized planning process to ensure it can all roll up into a single provincial strategy.

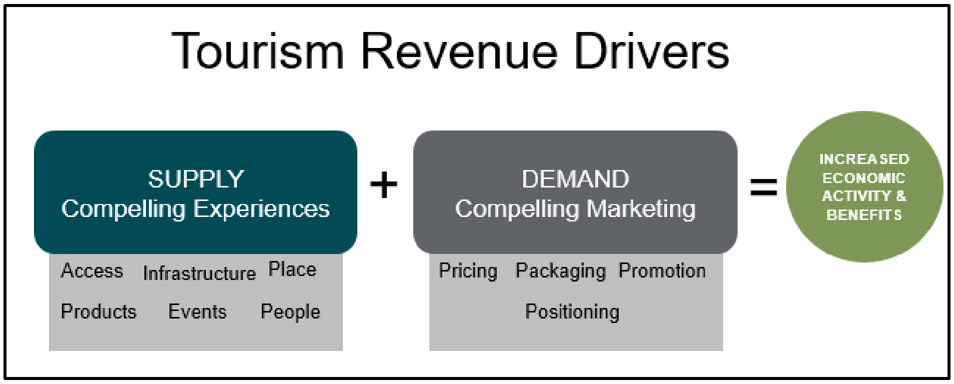
So what is destination development? As far as tourism theory goes, every destination has a natural life cycle. A destination's appeal will naturally decline when one of these things happen:

- A destination deteriorates beyond saleable levels (e.g. lack of investment, aging infrastructure and businesses),
- Consumer needs change to a point of a destination becoming irrelevant (e.g., non-responsive to visitors),
- Political decisions (e.g., government policy change),
- Competition, or
- Things beyond our control (e.g., value of dollar, pan endemic illness, government).

Destination development is the mechanism where that natural life cycle is managed to ensure a destination evolves to remain "desirable" for the ever-changing consumer. Destination development happens when industry and government plan to enhance the quality of the visitor's experience by ensuring tourism services, amenities and practices meet and exceed visitor expectations.

Tourism has two primary revenue drivers – supply and demand. Compelling marketing efforts strive to create short-term demand for a destination and create immediate urgency for people to want to visit. Destination development focuses solely on the supply side of tourism by providing compelling experiences, quality infrastructure and remarkable service to entice repeat visitation and recommendations. Components of destination development include: industry development (training, human resources); policy; infrastructure;

product development; access, transportation, signage, and wayfinding; investment and funding; business operating conditions (e.g. insurance, permitting etc.); destination management; community planning, and sustainability.



The benefits of destination development include:

- Create a clear 'road-map' for the destination,
- Leverage the strength of the destination as seen by the visitor,
- Identify opportunities and challenges,
- Establish a joint vision that will direct development activity in a range of areas,
- Establish priorities and align investments to grow the visitor economy, and
- Establish the basis for joint action and inter-community dialogue.

Destination Development Strategies will not:

- Duplicate ongoing efforts or create new organizational structures,
- Create new administrative organizations or governance models,
- Create marketing, branding and market position plans,
- Commit or guarantee access to funding for identified priorities, or
- Commit or guarantee changes to identified policy or government programs.

1.2 Planning Process

The following planning process was followed to ensure this plan was developed based on a thoughtful process with consistency participation from a diverse group of industry partners that impact tourism either directly or indirectly. The process follows a semi-structured design by Destination BC that was customized specifically for the West Kootenay/Revelstoke planning area.

Complete

1. Session 1 - Kick-off Meeting on July 13, 2016
    a. Introduced the program, engaged stakeholders and began to gather information that helped in understanding the context of the destination.

2. Review of planning area reports, strategies, plans and other information
    a. For a full list of documents that have been reviewed as part of this process, see Appendix 7.2.
3. Session 2 - working sessions with representative stakeholders on September 21 (Nakusp), September 22 (Ainsworth Hot Springs) and September 23 (Trail)
    a. Reviewed the operating context and captured participants input on constraints and opportunities.
4. Stakeholder interviews and site visits
    a. Over 25 stakeholder interviews were conducted to develop a deeper understanding of the operating context, constraints and opportunities.
    b. Over the course of the last 10 years, the facilitator has visited the planning area more than 25 times working with Rossland, the Lower Columbia group (Rossland, Trail, Warfield, Montrose, Fruitvale), Castlegar, Nelson, Slocan Valley, Nakusp and the West Koot Route, Kaslo/Nelson Kootenay Lake consortium). Over this time period and these many visits, the evolution of the region and its success and continued challenges have been experienced. Site visits have included a wide range of accommodations, activities, retail and restaurant experiences at varying times of year. This perspective as a visitor to the planning area has provided first hand understanding of what makes the West Kootenay/Revelstoke planning area a unique and special place to visit, as well as experiencing some of the challenges and opportunities.
5. Industry Engagement
    a. Stakeholders were engaged in the process through a survey to validate and provide further input into the constraints and opportunities identified in Session 2. There were 68 survey responses from 170 invites. Almost half of the respondents self-categorized as tourism businesses.
6. Session 3 on November 29 (Nakusp) and 30 (Nelson)
    a. Review the planning considerations and develop a shared vision, goals and identify destination development themes.
7. Session 4 – Working Committee in February/March, 2017
    a. A smaller Working Committee will continue to draft the strategy and provide recommendations.
8. Industry Engagement
    a. Stakeholders will be invited to participate in a survey to validate and provide further input into the vision, goals and development themes that will be identified in Session 3.
    b. Stakeholders will be invited to provide feedback on the draft strategy and draft plan.

1.3 West Kootenay/Revelstoke Planning Area Description

1. Map and Geography

The West Kootenay/Revelstoke planning area stretches from Rossland/Trail/Castlegar in the west to Revelstoke in the north and Creston in the east. The southern boundary is the US border. It includes the communities of Revelstoke, Nakusp, New Denver, Silverton, Slocan, Kaslo, Creston, Nelson, Castlegar, Salmo, Rossland, Trail, Montrose, Fruitvale, Warfield, and all areas of the Regional District of Central Kootenay, Areas A and B of the Regional District of Kootenay Boundary and Area A of the Columbia Shuswap Regional District.

The West Kootenay/Revelstoke planning area is within the Traditional Territory of the Ktunaxa Nation which includes the Ktunaxa Nation Council, with central government offices located in Cranbrook, and the following communities located in Canada (two additional communities are located south of the 49th parallel):ʔakisq̓nuk First Nation in Windemere; ʔakink̓umǂasnuqǂiʔit (Tobacco Plains Indian Band) in Grasmere, ʔaq̓am (St. Mary's Indian Band) near Cranbrook; and yaqan nuykiy (Lower Kootenay Indian Band) near Creston). See map below:

Source: www.ktunaxa.org

The Sinixt First Nation (Arrow Lakes people), although declared extinct by the Federal government in 1956 are currently pursuing a reversal of this decision. Sinixt Traditional Territory also includes the West Kootenay/Revelstoke planning area.

Secwepemc and Okanagan indigenous peoples also indicate Traditional Territory interests within the West Kootenay/Revelstoke planning area.

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Columbia Power and the Columbia Basin Trust have a long history in the planning area. Pursuant to the Columbia Basin Accord (1995), the original mandate of Columbia Power was to undertake power project investments as the agent of the Province in partnership with Columbia Basin Trust (the Trust). Columbia Power and the Trust together received $500 million to develop, as joint venture partners, three core power projects in the Columbia River Basin.

Columbia Power’s role is to develop, build and operate these projects on behalf of the partnership. Income from these projects is distributed equally to the Trust and Columbia Power. The Trust uses its income to support efforts by residents of the region to create social, economic and environmental well-being in the Basin. Columbia Power uses the income to reinvest in project development, including Waneta Expansion, currently under construction and pay dividends to its shareholder, the Province of BC.

Columbia Basin Trust reported in July, 2016 that it had delivered $31 million in funding to projects in the last year. CBT has thirteen strategic priorities many of which align well with destination development.

The landscapes of the area are stunning with countless mountain peaks, narrow winding valleys, rivers and lakes. The Columbia Mountains have four ranges (Cariboo Mountains, Monashee Mountains, Selkirk Mountains and Purcell Mountains) with the planning area lying principally in the Selkirk Mountains.

Kokanee and Woodbury glaciers are found in Kokanee Glacier Provincial Park which sits mostly above 1800 metres in elevation.

2. Prominent Communities

The West Kootenay/Revelstoke planning area lies within the traditional territory of both the K’tunaxa First Nation and the Sinixt First Nation. K’tunaxa communities include four communities (ʔakisq̓nuk First Nation? in Windemere; ʔakink̓umǂasnuqǂiʔit – Tobacco Plains Indian Band in Grasmere, ʔaq̓am – St. Mary’s in Cranbrook; yaqan nuykiy – Lower Kootenay Band based in Creston). Only the Lower Kootenay Band is within the current destination development planning area. The Sinixt First Nation territory encompasses much of the planning area and a court decision is pending regarding the reversal of the decision to declare them 'extinct' for purposes of the Indian Act.

There are several local and regional district governments with jurisdiction in the planning area including:

- City of Revelstoke (also a designated Resort Municipality receiving Resort Municipality Initiative funding)
- Village of Nakusp
- Village of New Denver
- Village of Slocan
- Village of Silverton
- Village of Kaslo
- Town of Creston
- City of Nelson
- City of Castlegar
- City of Trail
- City of Rossland (also a designated Resort Community receiving Resort Municipality Initiative funding)
- Regional District of Central Kootenay (all areas)
- Regional District of Kootenay Boundary (A & B)
- Columbia Shuswap Regional District A.

In total, there are approximately 60,000 people residing in the West Kootenay/Revelstoke planning area. The Columbia Basin Rural Development Institute reports the following population statistics[4]:

4 Columbia Basin Rural Development Insitute www.cbrdi.ca

Table 1 below provides detailed data for each community and adjacent Regional District (RD) Area in the West Kootenay Corridor. Overall the population of the West Kootenay Corridor increased by 2,731 (4.2%) over the last 10 years. Similar to the 5 year trend, the Nelson and Castlegar Areas fueled this growth. The Cities of Trail and Rossland also experienced significant growth over the last 5 years.

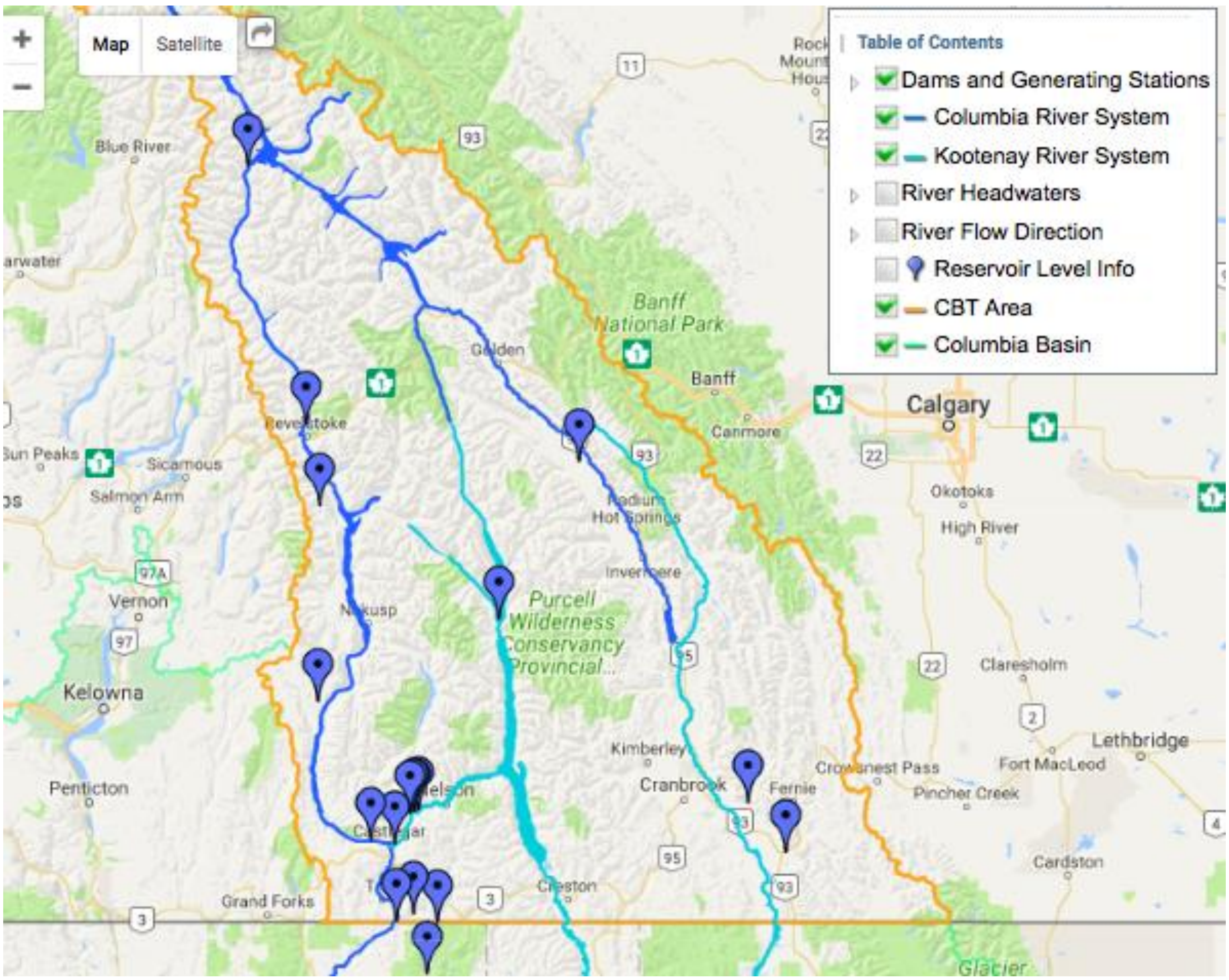
Table 1. Population Growth and Decline in the West Kootenay Corridor, 2006-2011

Name	2011 Population	2006 Population	Change, 2006-2011	% Change, 2006-2011
Nelson	10,230	9,258	972	9.5%
Central Kootenay E	3,781	3,716	65	1.7%
Central Kootenay F	3,976	3,730	246	6.2%
Central Kootenay G	1,597	1,605	-8	-0.5%
Salmo	1,139	1,007	132	11.6%
Nelson & Area	**20,723**	**19,316**	**1,407**	**6.8%**
Castlegar	7,816	7,259	557	7.1%
Central Kootenay I	2,570	2,415	155	6.0%
Central Kootenay J	2,996	2,792	204	6.8%
Castlegar & Area	**13,382**	**12,466**	**916**	**6.8%**
Trail	7,681	7,237	444	5.8%
Fruitvale	2,016	1,952	64	3.2%
Montrose	1,030	1,012	18	1.7%
Warfield	1,700	1,729	-29	-1.7%
Rossland	3,556	3,278	278	7.8%
Kootenay Boundary A	1,845	1,989	-144	-7.8%
Kootenay Boundary B	1,395	1,418	-23	-1.6%
Trail & Rossland Area	**19,223**	**18,615**	**608**	**3.2%**
Nakusp	1,569	1,524	45	2.9%
Central Kootenay K	1,759	1,800	-41	-2.3%
Nakusp & Area	**3,328**	**3,324**	**4**	**0.1%**
New Denver	504	512	-8	-1.6%
Silverton	195	185	10	5.1%
Slocan	296	314	-18	-6.1%
Central Kootenay H	4,289	4,319	-30	-0.7%
Slocan Valley	**5,284**	**5,330**	**-46**	**-0.9%**
Kaslo	1,026	1,072	-46	-4.5%
Central Kootenay D	1,413	1,525	-112	-7.9%
Kaslo & Area	**2,439**	**2,597**	**-158**	**-6.5%**
West Kootenay Corridor	**64,379**	**61,648**	**2,731**	**4.2%**
Basin-Boundary Region	**161,741**	**157,972**	**3,769**	**2.3%**
British Columbia	**4,400,057**	**4,113,487**	**286,570**	**6.5%**

The Columbia Basin Rural Development Institute reports in its 2015 'State of the Basin' that the total estimated Basin-Boundary population has remained relatively stable since 2011 but the youth component (0-19 years) shrank while the senior component (65+) expanded.

3. Economic Conditions and Drivers

The economy of the West Kootenay/Revelstoke planning region is diversified and includes forestry, mining, as well as a growing technology and service sector. Hydro-related economic activity has always been significant in the region with projects like the $900 million Waneta Expansion Project; $205 million Brilliant Expansion Generating Station and the $270 million Arrow Lakes Generating Station. [5]



Source: www.ourtrust.org

5 Source: www.columbiapower.org

Teck Resources Limited located in Trail is one of the largest community employers in the West Kootenays and is one of the world's largest fully integrated zinc and lead smelting and refining complexes. The service and technology sectors appear to be growing particularly in areas such as Nelson, Trail and Rossland. Surveys conducted by the Lower Columbia Community Development Team Society (www.lccdts.com/wp-content/uploads/LCPP-Exec-Summay-final.pdf) confirmed in its stakeholder engagement process that tourism related growth is seen as one of the most significant regional economic opportunities.

While there is no current economic reporting that matches the exact boundaries of the planning area, the 'State of the Basin' report for 2015 published by the Columbia Basin Rural Development Institute provides insights that are largely applicable to the West Kootenay/Revelstoke planning area (see www.cbrdi.ca/state-of-the-basin).

The report notes that the number of households in the Columbia Basin that feel that they can afford the necessities is up in 2015 over 2014. Consumer confidence in this region in 2015 is down compared to 2014 with only 25% of poll respondents feeling they are better off financially as compared to 6 months ago. Only about 15% agree that there are sufficient job opportunities available in their community. The percentage of the labour force with post-secondary education has been on a steady increase over the last five years but remains below provincial and national averages. While there are pockets of affluence in the planning area, it is generally characterized by low to moderate income levels.

Median incomes vary widely be community and by gender and are typically below Provincial levels with the exception of communities like Elkford and Sparwood where there is a strong mining economy:

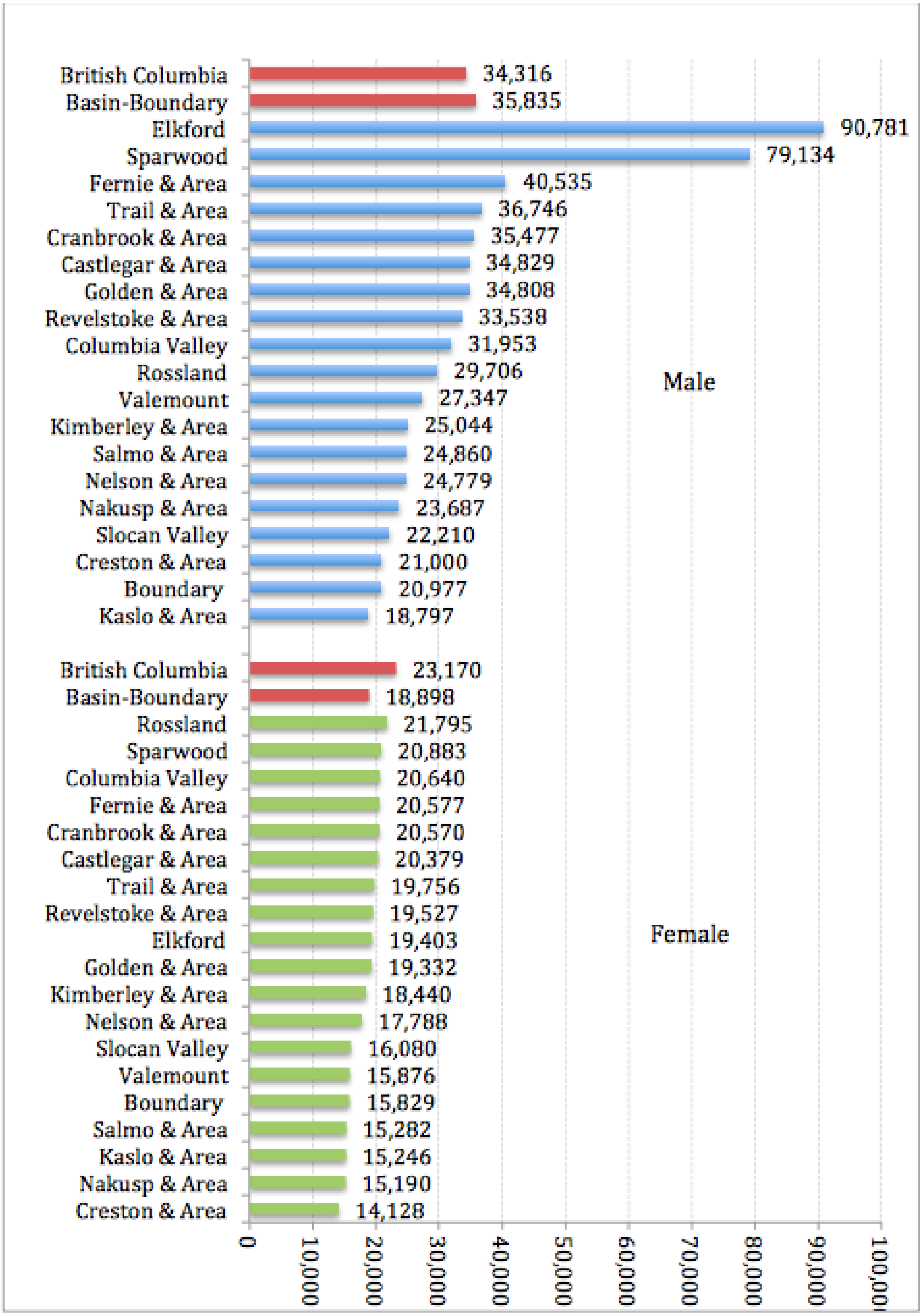


Figure 1: Median income by gender, 2009
Source: BC Stats, 2012d

4. Climate/Ecosystems/Species

The mountainous terrain creates a diverse array of ecosystems, from high alpine lakes to dense riparian forests. In addition to the towering peaks and glaciers, the West Kootenay is defined by three large lake systems within the Columbia Basin: Slocan Lake, Kootenay Lake, and Arrow Lakes. Seasonal weather patterns have combined with rugged topology to create an eco-type in the West Kootenay that is unique in the world: the inland temperate rainforest. Huge cedars and hemlocks stretch toward the sky, with multi-layered canopies and sparse underbrush. There is literally nowhere else on earth where a temperate rainforest lies so far from the ocean. As a result, the Kootenays are home to an array of rare and endemic species, from the Giant Helleborine to the Woodland Caribou. Some of the region's species include:

Aquatic species:
Kootenay Lake is home to the world's only freshwater salmon: the Kokanee. Unlike other salmon species like the Coho and Chinook, Kokanee do not migrate to the ocean and return to their natal streams. Instead, Kokanee move from their small streams into the vast Kootenay Lake, where they feed on other fish as well as insects. Once they reach adulthood, the Kokanee return to their birth streams to bury their eggs in the gravel. Kokanee can be seen in many streams in late august and early September around Kootenay Lake.

The Kokanee are not the biggest fish in the region. White sturgeon measuring up to 20 feet long roam the depths of the lakes, feeding on dead shad and other smaller fish. The sturgeon is a cartilaginous fish (like a shark), and retains many prehistoric features dating back to its emergence 175 million years ago. The construction of the Libby Dam in 1974 resulted in a changed flow regime that has hampered the sturgeons' reproduction. As a result, the vast majority of the genetically unique Kootenay sturgeon population is over 25 years of age with not enough young fish to replenish the population. An international team of scientists is working to restock the population with juveniles and to adjust the water management practices to ensure the survival of the species.

The Gerrard rainbow trout is another noteworthy species. The Gerrard trout is the largest rainbow trout in the world, and is endemic to the Lardeau valley north of Kaslo. The trout return to the Lardeau River to spawn each May after feeding through the winter on Kokanee salmon. At one time, due to overfishing and other factors, the population was down to 150 fish. Thanks to new regulations and management strategies (particularly the addition of nutrients to the North Arm of the Lake), the population has recovered to over 1,000 fish.

Bull Trout are a blue-listed species of char, identifiable by their unusually large head and mouth. The trout require exceptionally cold, clear water to survive and spawn, and prefer habitat with abundant large woody debris.

Terrestrial species:
The Mountain Caribou is a distinct subspecies from the Woodland Caribou that migrate north to the arctic. The Mountain Caribou depend entirely on old growth forests, where their ability to survive on lichen allows them to winter in high elevations where predators are less abundant. There are only 1900 of these animals remaining in the world.

The grizzly bear is a subspecies of brown bear that has been extirpated (locally extinct) from much of its historic range due to human settlement, habitat fragmentation by highways and roads, and habitat loss. Once thriving as far south as California and Mexico in prairie habitat, the grizzly bear is now limited to mountain woodlands such as those in the Kootenays, where it generally subsists on berries, roots, grubs, and small mammals.

The wolverine, like the grizzly bear, was once common in many parts of the US and Canada and can still be found in the West Kootenay/Revelstoke planning area.

The West Kootenay/Revelstoke planning area is primarily the Interior Cedar-Hemlock biogeoclimatic zones[6]:

The Interior Cedar Hemlock (ICH) zone occupies valley bottoms in the interior “wet-belt” in the Columbia and Rocky Mountains of southern British Columbia and in the Nass and Skeena river basins in the northern part of the province. The climate is typified by cool, wet winters and warm dry summers. The mean annual precipitation is 500-1200mm of which 25-50% falls as snow and the mean annual temperature is 2 - 8.7 C

The ICH typically grades into the Engelmann Spruce Sub Alpine Fir (ESSF) zone throughout its range. The ICH is found from valley bottoms to 1500m in the southern part of its range and to 1000m in the northern part of its range.

Meidinger and Pojar (1991) further classify eleven subzones in the ICH, which range from very dry to very wet regions. The driest subzone (ICHxw) occurs around the Creston valley and Trail BC. Two dry subzones, the ICHdw and ICHdk occupy valley bottom around the Lower Arrow Lakes, Slocan Valley, Kootenay, Goat and Moyie rivers. Four moist subzones (ICHmw, ICHmm, ICHmk and ICHmc) occupy valley bottom and mid elevations in the central parts of the Columbia, Purcell and Rocky mountains and around Shuswap Lake. Two wet subzones (ICHwk and ICHwc) are found in the northern Columbia Mountains, Quesnel Highlands and Cassier Mountains.

The ICH has the greatest tree species diversity in the province and is the most productive forested zone in the provincial interior (Meidinger and Pojar (1991). Forested sites are typified by western redcedar and western hemlock. In the central and southern part of the range Hybrid white spruce (Picea glauca x engelmanii), grand fir, subalpine fir, western larch, Douglas-fir, lodgepole pine and western white pine are common. Ponderosa pine is typical on very dry sites in the extreme southern end of the range near Nelson. Roche spruce, a hybrid between Sitka spruce and White spruce, is found in valley at the northern end of the ICH range.

Zonal ecosystems are typified by site series of western hemlock-western redcedar-Falsebox (Paxistima myrsinites) and Feathermoss (Pleurozium schreberi). In the wetter regions, devil’s club (Oplopanax horridus) is found on zonal sites along with ladyfern (Athyrium felix-femina). In the very dry region (ICHxw), western redcedar and hemlock are sporadic on zonal sites and occur under a main canopy of Douglas-fir and Ponderosa pine. Dry regions such as the ICHdw typically have Ponderosa pine restricted to the drier site series on steep south-facing slopes and rock outcrops.

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[6] Meidinger, D. and Pojar, J. 1991. Ecosystems of British Columbia. British Columbia Ministry of Forests. 330 pp. http://www.for.gov.bc.ca/hfd/pubs/Docs/Srs/SRseries.htm

Mixtures of spruce, devil's club, horsetail (Equisetum spp.) and skunk cabbage (Lysichiton americanum) occur in wet depression in dry to very dry regions of the ICH.

The variety of tree species provide for a wide range of silvicultural systems and wood products. In addition, tree species diversity has buffered this zone from extensive insect and disease outbreaks although in many areas significant problems still occur.

Large river systems such as the Columbia and Kootenay provide hydroelectric power generation for BC. In addition, many smaller "green power" hydroelectric projects are starting to occur throughout this region.

The Creston valley is the only area in the ICH that has a significant use as agriculture. Throughout the rest of the ICH, steep topography, cool climates or flooding by hydro make agriculture less productive.

Cattle grazing is restricted to cutblocks and roadsides. Often these areas are grass-seeded with forage to increase the availability of feed.

Virtually all recreational activities can occur within the ICH. Adequate snowfalls permit winter activities such as cross-country skiing and snowmobiling. Cool summer temperatures allow for activities such as hiking, biking, wildlife viewing, hunting and fishing.

5. Key tourism features

The planning area offers visitors a wide range of experiences including:

- 5.1. Winter outdoor experiences
- 5.2. Outdoor recreation in spring/summer/fall
- 5.3. Hotsprings and wellness related experiences
- 5.4. Arts and Culture/History and Heritage
- 5.5. Agritourism and Field to Table Culinary Experiences
- 5.6. Golf Courses
- 5.7. Other Unique Features

Each of these key tourism features is described more fully below:

5.1 Winter Outdoor Experiences

Traditional major winter attractions for the area are its access to 'epic powder' including downhill skiing/snowboarding in alpine resorts or accessed by helicopter or snowcat, snowmobiling, backcountry touring and Nordic skiing. The planning area is part of the larger 'Powder Highway', a marketing consortium led by Kootenay Rockies Tourism which includes the highest concentration of alpine resort, backcountry, cat, heli and Nordic skiing/riding in the world.

The Powder Highway is made up of 70+ ski operators along the route, including (**bold highlighted listings are within the planning area):**

8 Alpine Ski Resorts

- Fairmont Hot Springs Resort

- Fernie Alpine Resort
- Kicking Horse Mountain Resort (Golden)
- Kimberley Alpine Resort
- Panorama Mountain Village (Invermere)
- **Red Mountain Resort (Rossland)**
- **Revelstoke Mountain Resort**
- **Whitewater Ski Resort (Nelson)**

23 Backcountry Lodges

- Amiskwi Lodge (Yoho)
- Assiniboine Lodge (Mt. Assiniboine)
- Battle Abby (Golden)
- **Blanket Glacier Chalet** (Revelstoke)
- Boulder Hut Adventures (Kimberley)
- Campbell Icefields Chalet (Golden)
- Golden Alpine Holidays (Golden)
- **Ice Creek Lodge** (Winlaw)
- Icefall Lodge (Golden)
- Mistaya Lodge (Golden)
- **Mt. Carlyle Lodge** (Winlaw)
- **North Valley Huts** (New Denver)
- **Powder Creek Lodge** (Nelson)
- Purcell Mountain Lodge (Golden)
- Selkirk Lodge (Golden)
- **Selkirk Mountain Experience** (Revelstoke)
- Sol Mountain Touring (Clearwater)
- Sorcerer Lodge (Golden)
- **Summit Mountain Guides** (Nelson)
- Talus Lodge (Invermere)
- **Valhalla Mountain Lodge** (Nelson)
- **Valhalla Mountain Touring** (Hills/New Denver)
- Valkyr Adventures (Fauquier).

14 Cat-Ski Operators

- **Baldface Lodge** (Nelson)
- **Big Red Cats** (Rossland)
- Chatter Creek Mountain Lodges (Golden)
- Fernie Wilderness
- Island Lake Catskiing (Fernie)
- **K3 Cat Ski** (Revelstoke)
- Keefer Lake Lodge (Cherryville)
- Monashee Powder (Coldstream)
- **Mustang Powder Cat Skiing** (Malakwa)
- **Retallack Lodge** (New Denver)
- **Revelstoke Mountain Cat-Skiing**

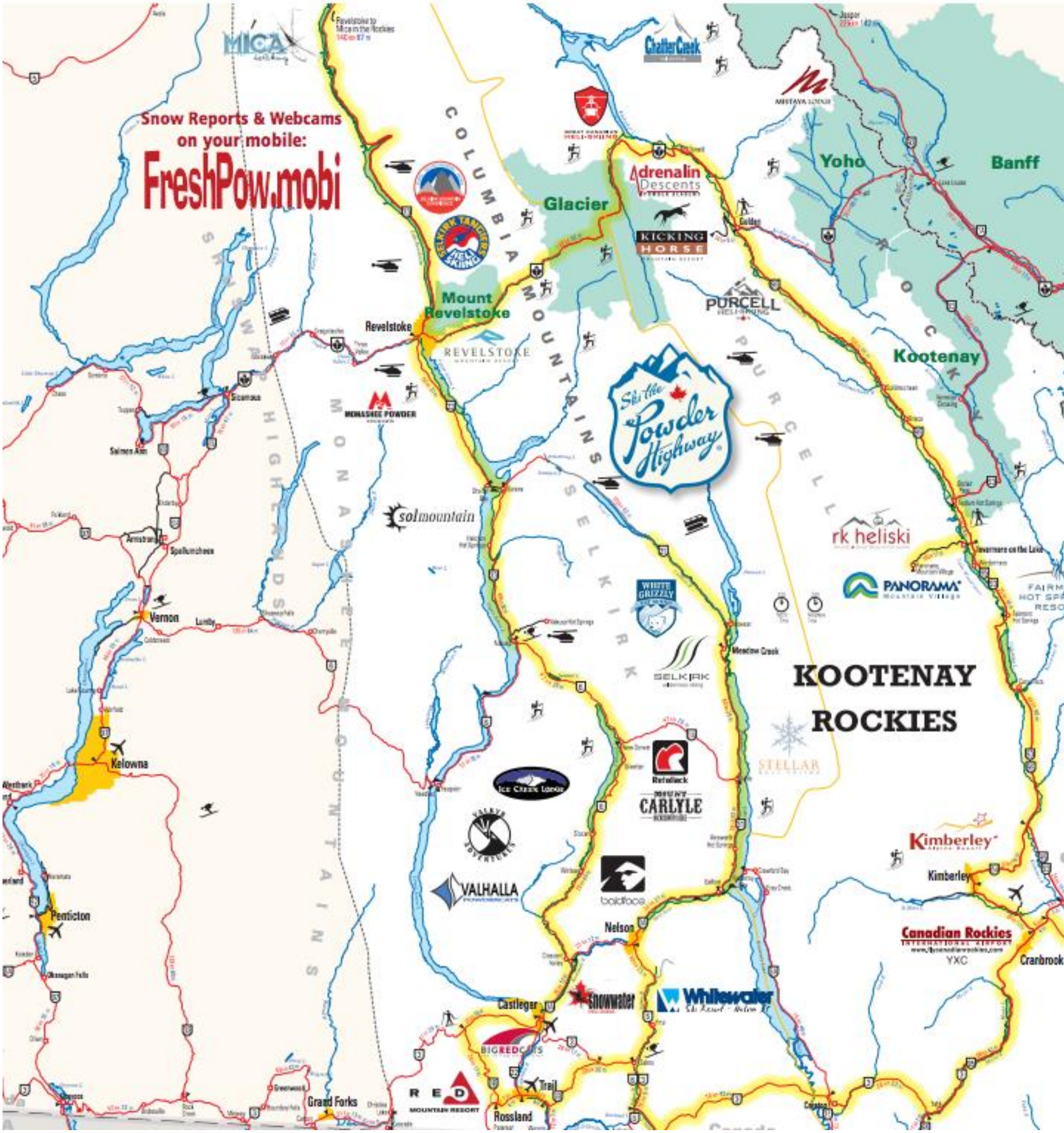
- **Selkirk Wilderness Skiing** (Meadow Creek)
- **Valhalla PowderCats** (Nelson)
- **White Grizzly Adventures** (Meadow Creek).

18 Heli-Ski Operators

- Chatter Creek Mountain Lodges (Golden)
- CMH Heli-Skiing (8 lodges throughout the region)
- **Eagle Pass Heliskiing** (Revelstoke)
- Great Canadian Heli-Skiing (Golden)
- Kingfisher Heliskiing (Cherryville)
- **Mica** Heliskiing (Revelstoke)
- Purcell Heli-Skiing (Golden)
- RK Heli-Ski (Panorama)
- **Selkirk Tangiers Heli Skiing** (Revelstoke)
- **Snowwater Heli-Skiing** (South Slocan)
- **Stellar Heli-Skiing** (Kaslo).

14 Nordic Clubs/Centres

- **Blackjack Ski Club** (Rossland)
- **Castlegar Nordic Club**
- Dawn Mountain Nordic Trails (Golden)
- Kicking Horse Ski Club (Field); Fernie Alpine Resort
- Kimberley Nordic Club
- Lake O'Hara Lodge (Field)
- **Nelson Nordic Ski Club**
- Nipika Mountain Resort (Radium Hot Springs)
- Panorama Nordic Ski Centre
- Revelstoke Nordic Club
- **Sol Mountain Touring** (Revelstoke)
- Talus Lodge (Invermere)
- The Whiteway (Invermere).

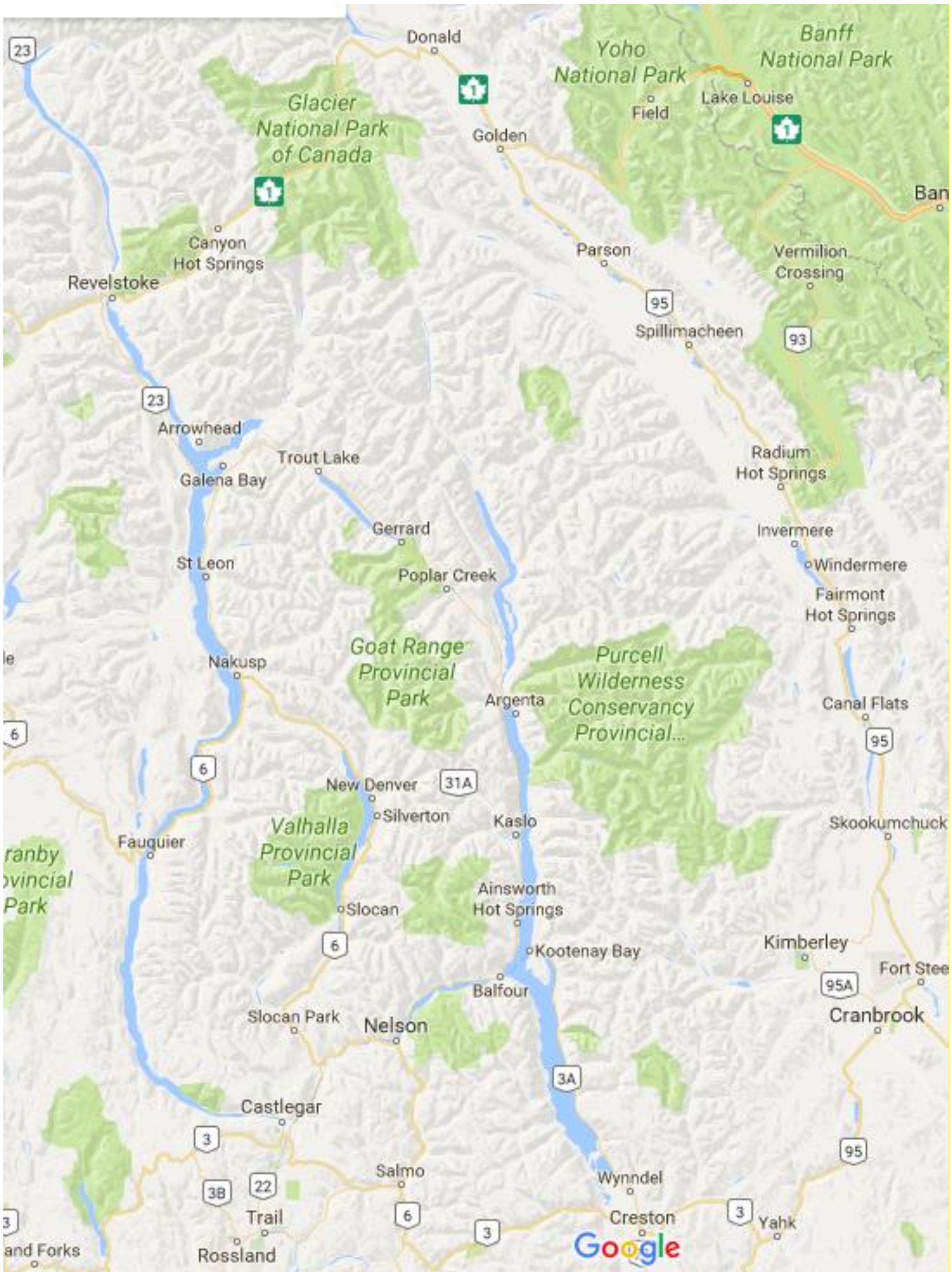

Snow Reports & Webcams
on your mobile:
FreshPow.mobi
COLUMBIA MOUNTAINS
SELKIRK
PURCELL
ROCKIES
Glacier
Mount Revelstoke
Yoho
Banff
Kootenay
Adrenalin Descents
KICKING HORSE
PURCELL
REVELSTOKE
Revelstoke
Ski the Powder Highway
MONASHEE POWDER
solmountain
rk heliski
PANORAMA
WHITE GRIZZLY
SELKIRK
KOOTENAY
ROCKIES
STELLAR
Retallack
MOUNT CARLYLE
Ice Creek Lodge
VALHALLA
baldface
Kimberley
Canadian Rockies
YXC
Cranbrook
Kimberley
Nelson
Castlegar
Snowwater
Whitewater
BIGRED CATS
RED MOUNTAIN RESORT
Trail
Rossland
Grand Forks
Vernon
Kelowna
Penticton
Salmon Arm
Sicamous
Lumby
Spallumcheen
Armstrong
Meadow Creek

5.2 Spring/Summer/Fall Outdoor Recreation

In spring/summer/fall, the combination of National Parks (Mt. Revelstoke National Park, nearby Glacier National Park and Yoho National Park), Provincial Parks (Valhalla Provincial Park; Kokanee Glacier Provincial Park, West Arm Provincial Park, Syringa Creek Provincial Park and nearby Purcell Wilderness Conservancy) as well as many smaller Provincial and municipal/regional parks and associated trail systems, amenities and campgrounds offer excellent outdoor recreation opportunities. See Parks Map below.

The network of trails include 'rail trails' (45 km of rail trail in the Slocan Valley alone – Columbia/Western railtrail runs from Castlegar to Midway where it joins the Kettle Valley Railway Line – see Maps below), boardwalks as well as more adventurous multi-night backcountry routes. Mountain biking has grown in popularity in recent years with rides like the Seven Summits in Rossland achieving 'epic' status from IMBA (International Mountain Biking Association). Alpine climbing/cragging/bouldering enthusiasts can find many great spots.

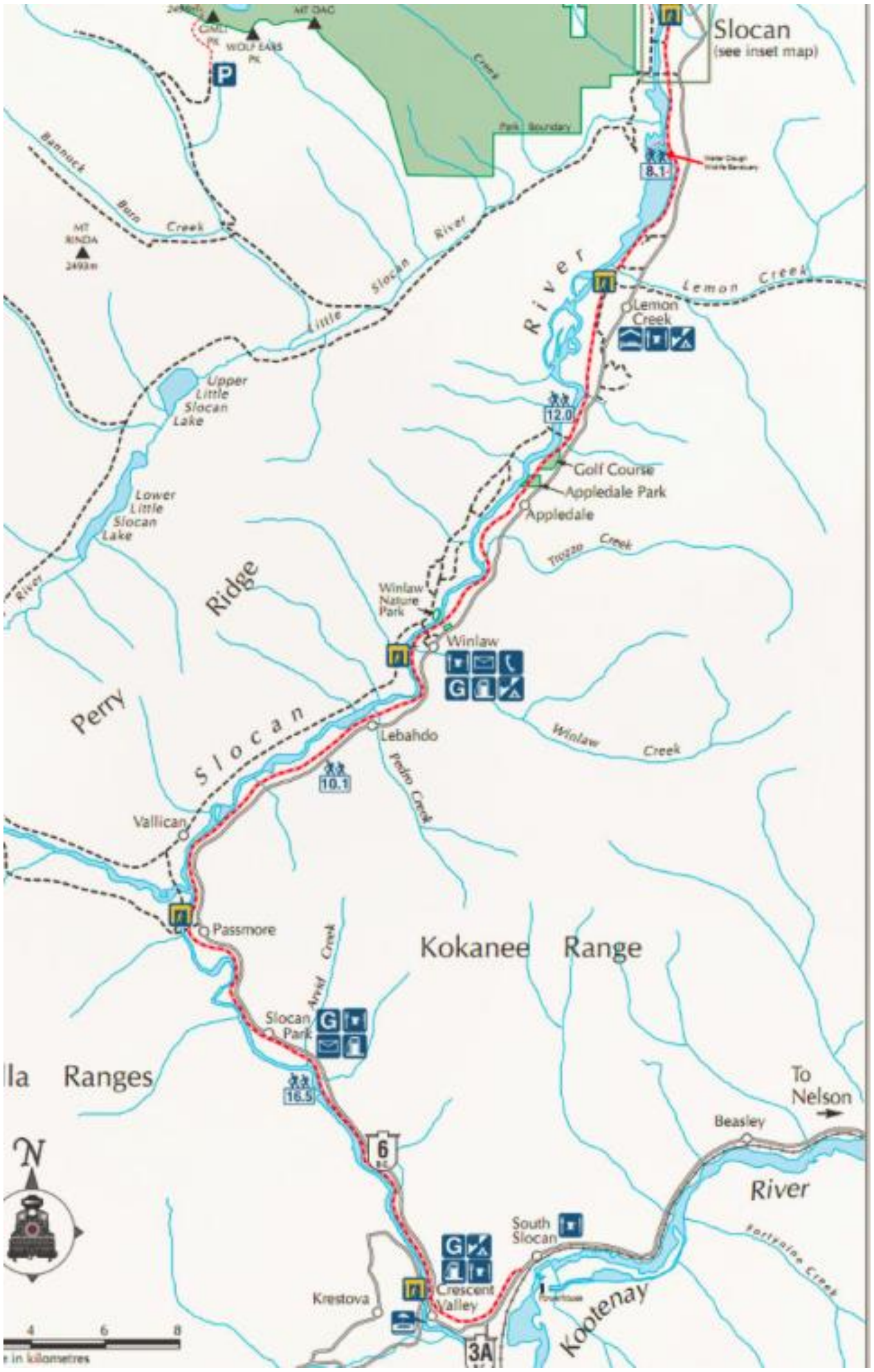
There is abundant freshwater in the planning area (Slocan Lake, Kootenay Lake, Arrow Lakes anda wealth of smaller alpine lakes; Columbia River, Slocan River, Kootenay River). This freshwater has drawn generations of visitors for summer vacations 'at the lake' as well as those who seek to paddle, kayak, standup paddleboard or experience whitewater runs.



Source: Google Maps

Columbia and Western Rail Trail (www.columbiaandwestern.ca)

Map of Slocan Valley Rail Trail (www.slocanvalleyrailtrail.ca)



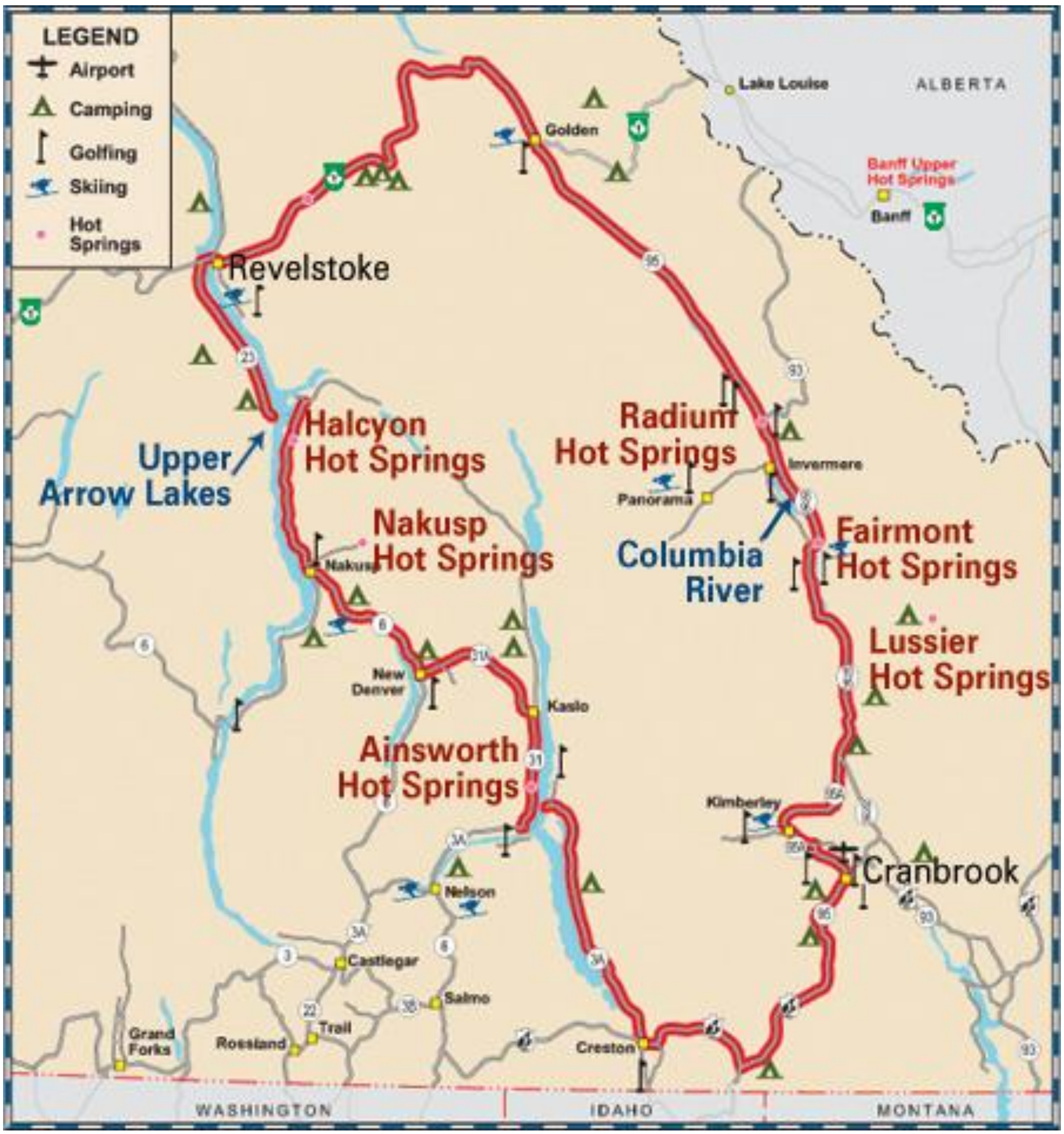
Hunting and angling are also pursued by many locals and visitors with angling opportunities throughout the many lakes and rivers in the planning area. The website www.kootenayangler.com describes the following angling opportunities:

- **Beatrice Lake:** Beatrice Lake is accessed via a 12 km (7.5 mi) trail up Beatrice Creek from Slocan in the Valhalla Provincial Park. Beatrice Lake is noted for its good fly fishing for rainbow trout.
- **Cameron Lake:** Cameron Lake is located west of Arrow Lake via the 40 km (25 mi) Arrow Park Creek road north from Arrow Park. A medium-size treed camping area with limited facilities and a cartop boat launch are available.
- **Catherine Lake:** Catherine Lake is located west of Arrow Lake via the 40 km (25 mi) Arrow Park Creek road north from Arrow Park. A short road from here branches east to the lake. Catherine Lake is reported as having rainbow trout of about 4.4 lbs.
- **Champion Lakes:** These three lakes are located in Champion Lakes Park. The turnoff is found approximately 6 km (3.7 mi) northeast of Fruitvale. Follow the access road 10 km (6 mi) to the park. Rainbow trout are stocked in all three lakes and reach sizes of 2 kg (4.5 lb).
- **Christina Lake:** This lake is located just off of Highway 3 22 km (13.6 mi) east of Grand Forks. A campground with all facilities and boat launch are provided.
- **Columbia River:** The Columbia River is the largest river in the Pacific Northwest region of North America. The river rises in the Rocky Mountains in British Columbia, Canada, flows northwest and then south into the U.S. state of Washington. The lower Columbia River stretches from Castlegar to the border. It is easily accessible from Castlegar and Trail, BC and offers exceptional Walleye, Kokanee, Bull Trout and Rainbow Trout fishing for spin casters, trollers, and fly fisherman.
- **Cottonwood Lake:** This lake is located 10 minutes outside of Nelson, BC toward Ymir. Access is marked 1km before Whitewater Road. The lake is stocked with Rainbow Trout and they reach sizes of up to 2lbs. Electric motors only. There are a few good fishing opportunities from shore for both spin casting and fly fishing.
- **Duck Lake:** When it comes to numbers and size, Duck Lake located near Creston BC is a strong contender for the title of best bass lake in British Columbia. Duck Lake is also part of the Creston Valley Wildlife Management Area, considered a critical international wetland and migration route. There are NO POWER BOATS allowed on the lake, including electric motors. This protects the shoreline areas where the waterfowl breed and nest. Please fish with caution and consideration. Always check the regulations for openings, closings, limits and special restrictions. Duck Lake is an excellent spot for ice fishing in the winter.
- **Erie Lake:** Erie Lake is a lake located just 3.8 miles from Salmo, in the province of British Columbia, Canada. Fishermen will find a variety of fish including northern pike, striped bass and rock bass here. Erie Lake is an excellent spot for ice fishing in the winter.
- **Jewel Lake:** The lake is approximately 23 km (14.3 mi) from Greenwood via 13 km (8 mi) of paved road and 10 km (6 mi) of gravel road. Camping areas and a resort are found on the lake.
- **Kokanee Lake**: This hike-in lake may be accessed via the Kaslo and Joker Mill-Keen Creek roads or by the Kokanee Creek Road southwest of Balfour on Highway 3A. Yellowstone cutthroat trout are resident in this deep, cold alpine lake.
- **Kootenay Lake:** This lake is over 100 km (62 mi) long with access from Nelson, Balfour, Kaslo, Crawford Bay, Boswell and several other points along Highway 31. The lake provides good fishing for Gerrard-strain rainbow trout of up to 10 kg (25 lb), Cutthroat Trout, Kokanee, Rainbow Trout, and Bull Trout weighing up to 12 kg (26 lb). Anglers can fly fish, spin cast, or troll many points along the shores of Kootenay Lake.

- **Lower Arrow Lake**: This 90 km (56 mi) long 3 km (2 mi) wide lake may be accessed from Faquier, Needles, Edgewood, Castlegar or Robson. Large Gerrard Rainbow Trout are resident in this lake where fishing is best in the fall months.
- **Mirror Lake:** The lake is located 5 km south of Kaslo just off of Highway 31. Smallmouth bass of up to 2 kg (4.4 lb) are abundant in the lake.
- **Nancy Greene Lake:** The lake is located 30 km (19 mi) west of Castlegar just off of Highway 3 near the Highway 3A junction. Power boats are not permitted on the lake. This lake is filled with rainbow trout of up to 30 cm (12 in).
- **Slocan Lake:** This 45 km (28 mi) lake runs beside Highway 6 and may be accessed from New Denver, Silverton and Slocan. This lake is renowned for its large rainbow and bull trout. Fly fishing near creek mouths and trolling for Kokanee are productive methods.
- **Slocan River:** The Slocan River is a 97-mile (156 km) long tributary of the Kootenay River in British Columbia. It is part of the Columbia River basin, as the Kootenay River is a tributary of the Columbia River. This river is open at limited times so check the regulations. The Slocan River offers excellent Rainbow and Bull Trout fishing for fly fisherman and anglers. Slocan River can be accessed anywhere along Highway 6.
- **Snowshoe Lake:** This lake is located just north of Highway 6 near the Needles ferry via a 5 km (3 mi) 4X4 access road. Both rainbow and brook trout are abundant in the lake and weigh up to 2 kg (4.4 lb).
- **Staubert Lake:** The lake is northeast of the Galena Bay Ferry on Highway 31. A campground with limited facilities and a cartop boat launch are provided. Avid anglers try their luck for rainbow trout using either fly fishing or deep trolling methods. The lake also supports a fair population of both Dolly Varden and brook trout.
- **Trout Lake**: Trout Lake is located 85 km (53 mi) north of Kaslo on Highway 31. Access is also possible from Nakusp and Revelstoke. All facilities are available at Trout Lake community. This deep, 30 km (19 mi) long lake is noted for its large rainbow and bull trout.
- **Upper Arrow Lake:** This large lake may be accessed from Nakusp, Galena Bay, Beaton and numerous other areas along Highway 23. This lake is noted for its excellent large trout fishing. Species of up to 10 kg (22 lb) have been reported and Dolly Varden in the lake average 5 kg (11 lb).
- **Whatsan Lake:** Access is via a gravel road north of the Arrow Lake ferry at Needles. Cabins, a camping area and boat launch are provided. Rainbow trout reaching weights of 1.5 kg (3.3 lb) as well as bull trout of up to 4.5 kg (10 lb) are resident in the lake. Kokanee are small but plentiful.
- **Wilgress Lake (Loon Lake):** This small lake is located 22.4 km (14.3 mi) west from Grand Forks on Highway 3. It provides the visitor with camping facilities, a boat launch, picnic site and modern restroom facilities.
- **Williamson Lake:** This small lake is located 30 km (19 mi) from Greenwood via 25 km of gravel and dirt road. A 4X4 is recommended. A BCFS camping area and cartop boat launch are provided.
- **Wilson Lake:** The lake is located 15 km (9 mi) east of Nakusp via a good logging road. BCFS campgrounds are located on the lake. This lake provides some of the best rainbow trout fishing in the Kootenays with fish of sizes up to 3 kg (6.5 lb). Kokanee is also abundant in the lake.
- **Xenia Lake:** The lake is 30 km (19 mi) north of Grand Forks on gravel road then 6 km (3.7 mi) by 4X4. A BCFS campground and cartop boat launch are provided.

5.3 Hotsprings and Wellness Experiences

Hotsprings are also a significant attraction and draw visitors to the area with a range of rustic, backcountry and developed options in places like Halcyon, Nakusp and Ainsworth Hot Springs. Complimenting the hotspring experience is a wide range of wellness services including spas, retreats, ashrams, health centres and educational opportunities related to wellness/healing. The ability to be immersed in surrounding nature and to enjoy local organic cuisine enhance this wellness experience.



5.4 Arts and Culture/History and Heritage

The planning area also benefits from a signficant artistic community, interesting heritage attractions, and many festivals/events. Crawford Bay on the east shore of Kootenay Lake has become well known for its artisan community and Kaslo, Balfour through to Nelson offers a density of arts, culture, unique retail shopping and interesting dining that motivates both regional and longer-haul travel.

Castlegar, with its unique Doukhobour heritage also has a thriving arts community and has developed a market niche with its annual Sculpturewalk. Kaslo has the signature paddlewheeler, the SS Moiye and its well known JazzFest with its iconic floating stage. Nakusp is perhaps best known for its hotsprings and backcountry but it too has an interesting mining and rail heritage with rolling stock being reclaimed and displayed in town. Trail's Italian heritage and interesting stairways and covered walkways offer additional cultural texture to the planning area.. The Slocan Valley has its own unique feel and history with the nearby Sandon 'ghost town' and Revelstoke has a history as a transportation and supply centre to the gold rush and as a forestry town is linked to the railroad with the CPR coming in 1885. All communities in the planning area benefit from the ever present 'Kootenay vibe' that has an aspirational quality for many travellers from near and far.

The planning area's festivals and events that currently draw visitation include:

Nelson Kootenay Lake area:

- Kootenay Festival of the Arts (April)
- Nelson Garden Festival (May)
- Kaslo May Days & Logger Sports (May)
- Kaslo Garden Festival (May)
- Kaslo and Nelson Artwalks (July)
- Elephant Mountain Literary Festival (July)
- Starbelly Jam (July)
- Unity Music Festival (July)
- Francophone Culture Festival (July)
- Kaslo Jazz Festival (August)
- Shambhala Music Festival (August)
- Columbia Basin Culture Tour (August)
- Marketfest – Nelson (July and August)
- MS West Kootenay Glacier Challenge (August)
- Outskirts Theatre Festival (August)
- Nelson Fat Tire Bike Festival (August)
- Kootenay Spirit Festival (August)
- Fringe Theatre Festival (August)
- Kootenay Sufferfest (September)
- Queen City Cruise Car Show (September)
- WaCanld Ride (September)
- Kootenay Spirit Festival (September)
- Kootenay Storytelling Festival (September)

- Kootenay Book Weekend (September)
- Woodbury Fishing Derby (October)
- Wine & Food Festival (October)
- Kaslo Fishing Derby (November)
- Santa on Baker Street (December)
- Kaslo Lights Up (December)
- Winter Carnival (January)
- Gericks Summit Cup (January)
- Snowed In Comedy Tour (February)
- Kaslo Winter in the Forest (February)
- Kootenay Coldsmoke (February)
- Tight & Bright (March)

Trail Festivals and Events:

- Music in the Park (summer in Gyro Park)
- Silver City Days Festival (May)
- Art Walk
- Festa Italiana (Saturday in June)
- Santa Claus Parade (Saturday in early December)
- Trail Market on the Esplanade (summer months)
- Red Roof Duathlon

Rossland Festivals and Events:

- Gold Fever Follies (July/August)
- Rossland Golden City Days (Sept)
- Rossland Mountain Film Festival (Nov)
- Rossland Winter Carnival (Jan)
- Beer Goggles (March)
- Rossland Rubberhead Enduro (July)
- Huck'en Berries Bike Jam (Aug/Sept long weekend)
- Spirit of Christmas (early December)
- Rossland Rubberhead Enduro (August)
- Broken Goat – 50 km Trail Run (July)
- Farmers Market (June to October)

Fruitvale Festivals and Events:

- Beaver Valley May Days
- Farmers Market (May to October)
- Fruitvale Mountain Music Festival (August)
  Annual Craft Fair (November)

Creston Festivals and Events:

- Blossom Festival
- Bird Fest
- Starbelly Jam Music Festival (Crawford Bay)
- Creston Fall Fair

Nakusp Festivals and Events:

- Nakusp Medieval Days
- BC Day Car Show
- Fall Fair

Slocan Valley

- Hills Garlic Festival (New Denver)
- Unity Music Festival
- Valhalla Summer School of Music

Revelstoke Festivals and Events:

- Stoked to Get Spanked MTB Race (June)
- Grizzly Plaza Nightly Live Music (July/August)
- Glacier Challenge (August long weekend)
- North Face Dirty Feet Trail Running Race
- TrailStoke Running Weekend (August)
- Bike Fest Revelstoke (September)
- Axix Mundi (September)
- Glacier Grind (September)

5.5 Agritourism and Field to Table Culinary Experiences

Creston's expansive valley offers unique wildlife viewing and birdwatching opportunities as well as growing agri-tourism experiences. Smaller farms are also found in the Slocan Valley and throughout the planning area. Local, organic foods are featured in many restaurant menus and there is a growing interest in the development of agritourism. Craft beer, wineries, distilleries and cideries include:

- Baillie Grohman Estate Winery – Creston
- Skimmerhorn Winery and Vineyard – Creston
- Wynnwood Cellars – Creston
- William Tell Family Estate - Creston
- Columbia Gardens Vineyard & Winery – Trail

- SOAHC Winery – Trail
- Kootenay Distillery - Slocan
- Heron Ridge Estates – Castlegar
- Mt. Begbie Brewing Company – Revelstoke
- Nelson Brewing Company - Nelson
- Torchlight Brewing Company - Nelson
- Rossland Beer Company – Rossland
- Ponoma Cider Mill - Burton

5.6 Golf Courses

The planning area has an excellent selection of mountain golf that is incredibly scenic as well as affordable as listed on the Kootenay Golf and Adventure Trail www.kootenaygolftrail.com :

- Birchbank Golf Club
- Castlegar Golf Club
- Balfour Golf Club
- Christina Lake Golf Club (outside of planning area but part of the Golf & Adventure Trail)
- Granite Point
- Redstone Resort
- Kokanee Springs Resort

There are additional golf courses in the planning area including:

- Creston Golf Club
- Revelstoke Golf Club
- Nakusp Centennial Golf Course
- Fauquier Golf Course

5.7 Other Unique Tourism Features

Additional unique tourism features of note include:

- Revelstoke Mountain Resort offers 'The Pipe Mountain Coaster' as well as the entire range of mountain resort activities beyond skiing in both summer and winter (hiking, mountain biking, tandem paragliding, heli-sightseeing, tubing, dogsledding, snowshoeing etc.)
- Red Mountain Resort Legacy Training Centre drawings athletes internationally for sport training
- Parts of the planning area are included and others are consider a 'Super Side Trip' as part of the International Selkirk Loop
- Creston Valley wildlife and birdwatching
- Trail – Charles Bailey Theatre offers seating for 719 – one of the largest performance venues in the planning area

An inventory of tourism assets and experiences in the planning area is under development as part of this process.

6. Transportation /Access

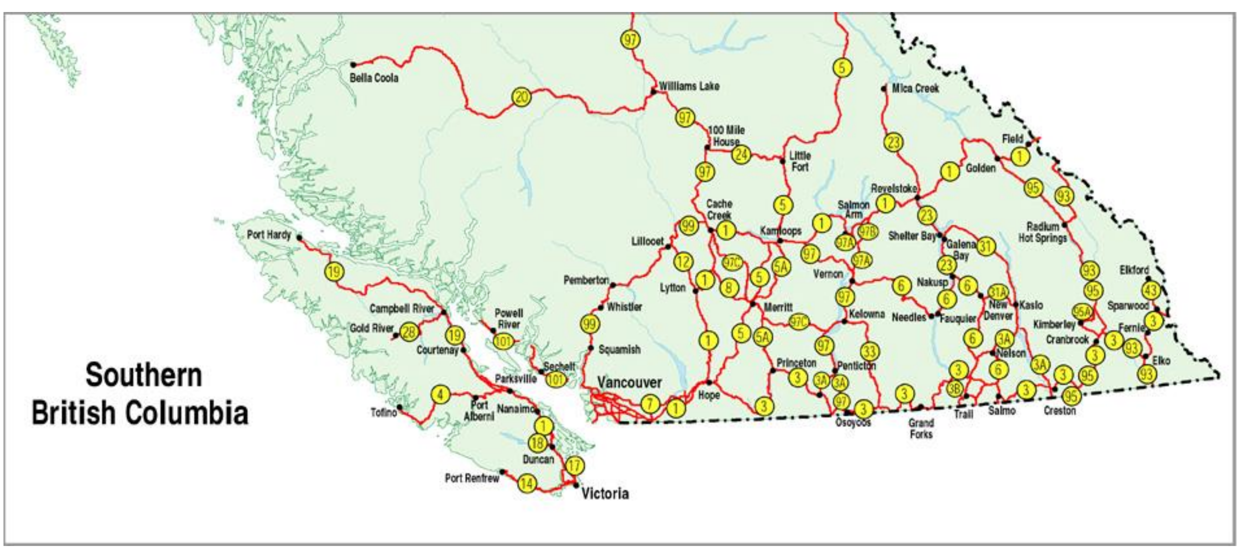
The West Kootenay/Revelstoke planning area is accessible by air with transfers required by private rental vehicle or shuttle service. Visitors arriving in Canada by air will fly to Cranbrook (serviced by Air Canada), to Castlegar (serviced by Air Canada), to Trail (serviced by Pacific Coastal), to Revelstoke (serviced by Pacific Coastal – winter only) or to Kelowna (serviced by Air Canada, Pacific Coastal and New Leaf). There is a shuttle service from the West Kootenay Regional Airport in Castlegar to Nelson that operates daily.

US travellers may choose to fly domestically to Spokane and transfer by shuttle. Airport shuttles are offered from Spokane Airport to Rossland, Castlegar and Nelson (daily in winter only from December 10th to April 2nd) ; from Spokane Airport to Nelson (summer on Saturday's only). www.kootenayshuttle.com .

Both Calgary and Vancouver have strong international lift for long-haul travellers to the planning area.

It should be noted however, that both the Trail Regional Airport and the West Kootenay Regional Airport have a challenging history of weather related flight cancellations. A $260,000 study has been recently commissioned to review the reliability of the airport in Castlegar. The airport in Trail has received funding for improvements to occur - $1.18 million was announced by the Province in June, 2016 for infrastructure improvements under the BC Air Access Program Funding.

Travel by road is scenic and draws motorcycle and sportcar touring as well as private vehicles, RV's and trailers. The primary east-west highway in the south is Highway #3 and #3A. Revelstoke is situated on the TransCanada Highway #1 in the north. North/south connections include use of inland ferries at Kootenay Bay-Balfour and Shelter Bay – Galena Bay and travel along Highway #6/23. Highway #31A connects New Denver to Kaslo.



Typical travel distances and times from major urban centres are as follows:

From	To	Kilometres	Travel Time
Vancouver	Revelstoke	600	6 ½ hours
Calgary	Revelstoke	500	6 hours
Kelowna	Revelstoke	235	3 hours
Vancouver	Nelson	660	7 ½ hours
Calgary	Nelson	622	6 ½ hours
Kelowna	Nelson	245	4 hours
Spokane	Nelson	238	3 hours
Spokane	Rossland	195	2 ½ hours
Calgary	Creston	500	5 ½ hours
Cranbrook	Creston	105	1 hour

Travel distances within the planning area are as follows:

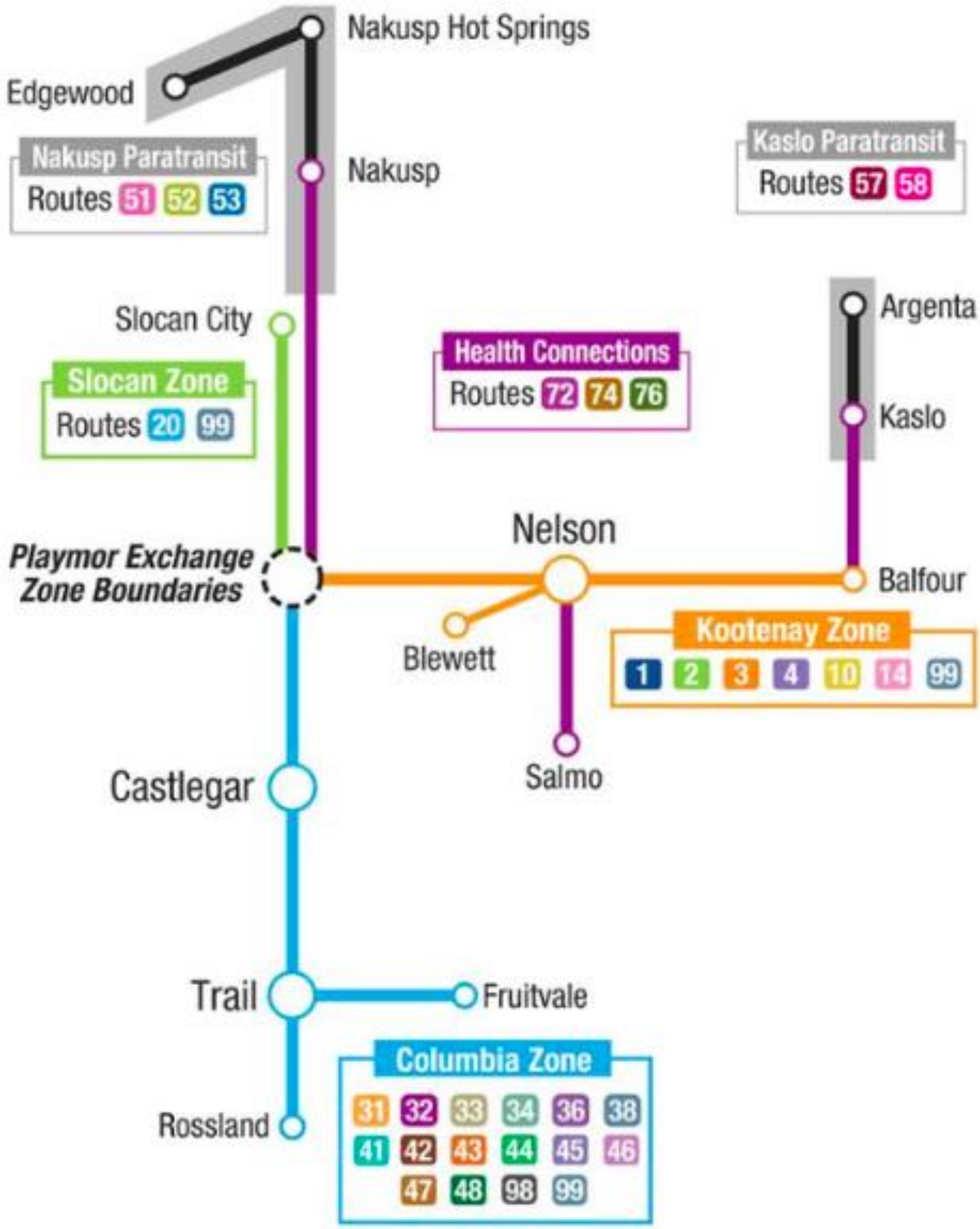
From	To	Kilometres	Travel Time
Revelstoke	Nakusp	105	2 hours (depending upon ferry schedule)
Revelstoke	Nelson	250	3 ½ hours
Rossland	Nelson	75	1 hour
Nelson	Creston	125	1 ½ hours
Nelson	Kaslo	70	1 hour
Nakusp	Kaslo	92	1 ¼ hours
Nakusp	New Denver	46	½ hour

Castlegar	Trail	30	½ hour
Trail	Rossland	9	10 minutes
Castlegar	Winlaw (Slocan Valley)	49	40 minutes
Winlaw (Slocan Valley)	Nelson	49	40 minutes

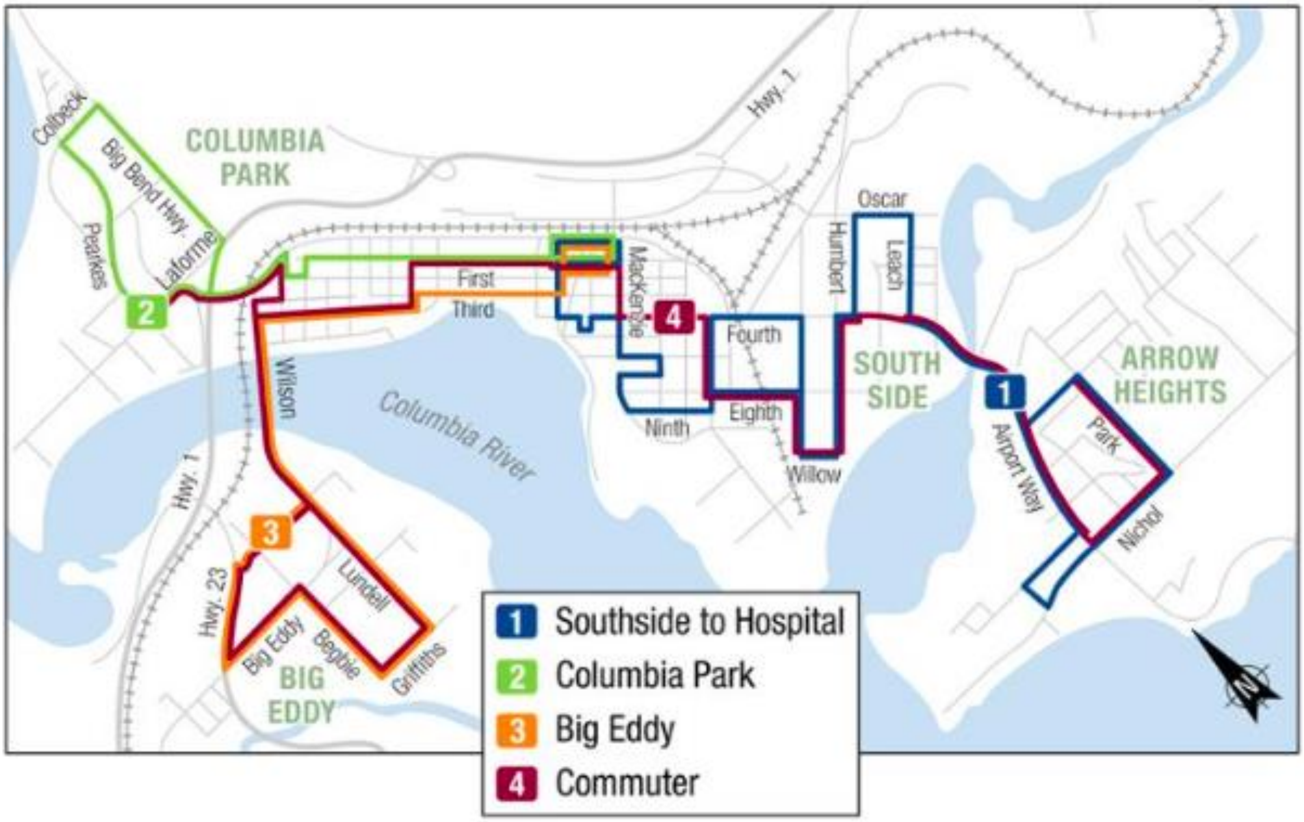
Beyond the airport shuttles notes above, in-destination transportation includes car rentals and limited public transit:

- Car rentals are available at all airports noted above
- Public transit in the West Kootenay area and Revelstoke area as per the maps below;

West Kootenay Transit Routes:



Revelstoke Transit Routes:



In Rossland and Revelstoke the resort ski areas are a short distance from the downtown core and shuttle service is provided to link the mountain experience with the base of accommodation, restaurants and retail. A one-way ticket on the Revelstoke Resort Express is $3/return is $5 and free with most hotel stays. The Rossland shuttle service is free.

7. Visitor Services

There are visitor centres in Rossland, Trail, Castlegar, Creston, Nelson, Kaslo, New Denver, Nakusp and Revelstoke. All provide visitor information, assistance and advice.

8. Communications/Technology

The West Kootenay/Revelstoke planning area experiences challenges with coverage and reliability of its broadband and cellular communications and technology infrastructure. Cell service is available in most cities and towns but is typically lost en route between destinations. Wifi 'hotspots' have been identified as highly desirable at key locations such as the parking/loading zones at ferries. Galena Bay ferry landing is scheduled to have WiFI installed by spring of 2017. Some communities have also identified unreliable hydro service as a limiting factor for destination development.

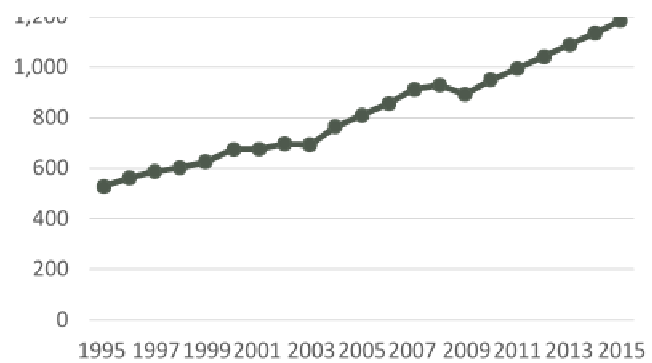
2 TOURISM INDUSTRY CONTEXT

2.1 Global Tourism Performance

Global tourism is one of the largest and fastest-growing economic sectors in the world. 2015 was no exception, with international tourists arrivals (ITAs) growing 4.4% over 2014 to reach 1,184 million. Over the past two decades ITAs have grown 125%. In fact, ITAs have grown by 4% or more every year since 2010. (Figure 4)

In 2015, Europe led growth in ITAs with a 5% increase over 2014. North America saw a 4% increase in ITAs. Arrivals to the Middle East grew about 3% and arrival to Africa declined by 3%.

Figure 1: Global International Tourism Arrivals (Millions), 1995-2015



Source: UNWTO Tourism Highlights, 2015

Spending by tourists follow a similar pattern. In 2015, spending by tourists was estimated to be $1,232 billion US dollars.[7] This represents 3.6% growth over 2014[8] and 25% growth since 2010.

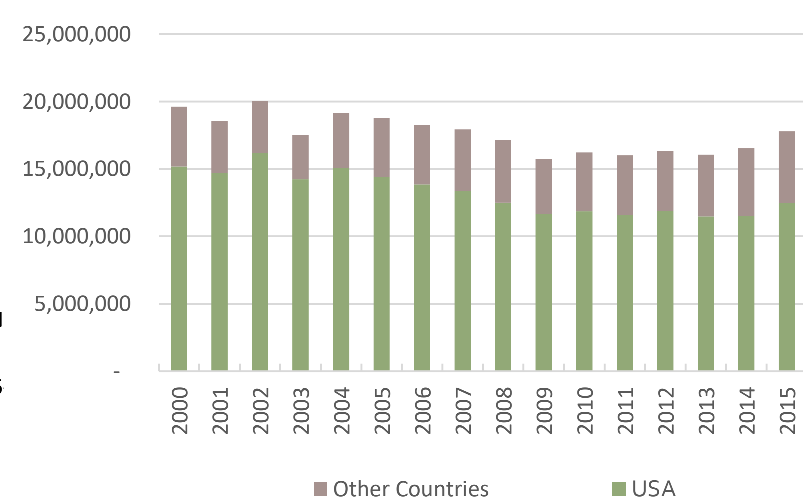
In the long term, growth is expected to continue over the next two decades. According to the UNWTO's Tourism Towards 2030, the number of international tourist arrivals worldwide will increase by an average of 3.3% a year over the period 2010 to 2030.[9] The pace of growth is expected to be higher in the emerging economy destinations like Asia, Latin America, Central and Eastern Europe, the Middle East and Africa (4.4% per year) compared to traditional destinations (2.2% per year). By 2030, more than half (57%) of international arrivals will be captured by emerging economy destinations.

Increasing competition, global security threats, economic conditions, natural disasters, disease outbreaks and border security concerns will continue to concern citizens worldwide and could impact project growth rates.

2.2 Canadian Tourism Performance

Similar to global economic impacts, tourism is Canada's top service export and is the top employer of young Canadians. Over the past decade, there has been steady growth in the economic performance of the Canadian tourism

Figure 2: International Overnight Visitors to Canada



[7] UNWTO World Tourism Barometer. 2016. United N

[8] Growth accounts for exchange rate fluctuations and

[9] Source: http://media.unwto.org/press-release/2016

industry. In 2015, tourism accounted for:[10] [11]

- Almost 17.8 million international overnight visitors (Figure 5),
- 637,000 jobs and 190,000 business establishments in Canada, and
- $16.8 billion in international tourism expenditures.

In 2015, almost 12.5 million or 70% of international visitors were from the United States. Other key international markets[12] include the United Kingdom (4% share), France (3% share), Germany (3% share) and Australia (2% share). Markets of emerging/transitional interest are Japan (2% share), South Korea (1% share), Mexico (1% share), Brazil (1% share), China (3% share), and India (1% share). China saw exceptional growth (29%) in 2014 but slower growth in 2015 (9%). In total, Canada's top 11 key markets account for 70% of international overnight visitors. (Figure 6)

Source: Statistics Canada. Data Table 427-0004

Figure 3: Canada's Key Markets, 2015

	Overnight Visitors		
	2015	Percent change over 2014	Share
United States	12,474,500	8%	70%
United Kingdom	715,548	6%	4%
France	500,502	4%	3%
China	493,827	9%	3%
Germany	328,870	1%	2%
Australia	286,906	2%	2%
Japan	275,027	6%	2%
Mexico	196,408	14%	1%
India	190,565	9%	1%
South Korea	188,585	16%	1%
Brazil	112,268	13%	1%
TOTAL	**17,782,949**	**8%**	**70%**

Source: Destination Canada

In the face of these recent increases in international visitor arrivals, Canada has not kept pace with its competitors. Canada's market share of global international tourism arrivals has declined from 2.9% in 2000 to 1.5% in 2014. 2015 marked a reversal in this trend where, Canada grew faster than the global growth rate.

2.3 BC Tourism Performance

2.3.1 Economic Indicators

The BC economy is diverse and evolving. Built on the foundations of the resource sector, the economy now primarily relies on the service industry (including tourism)[13]:

- In 2014, the economy grew by 2.9%, which was the second highest rate among provinces in Canada and above the national average. The tourism industry contributed $7.1 billion of added value to BC's gross domestic product, an increase of 4.5% from 2013. The economy has been projected to continue this growth into 2015.

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[10] Ambitious Together. 2015 Annual Report. 2016. Destination Canada.

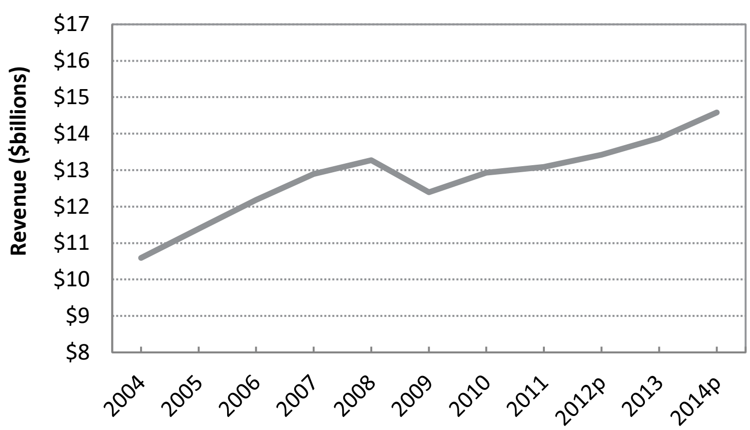
[11] Tourism Snapshot 2015 Year-in-Review. December 2016. Volume 11. Issue 12. 2016. Destination Canada.

[12] As designated by Destination Canada.

[13] Value of Tourism 2014. A Snapshot of Tourism in BC. 2015. Destination British Columbia.

- In 2014, the tourism industry generated $14.6 billion in revenue, a 5.1% increase from 2013, and a 37.7% increase from 2004. (Figure 7)
- In 2014, Municipal and Regional District Tax (MRDT) revenue grew by +9.0% over 2013 and reached a total of $1.7 billion. The tourism industry contributed $7.1 billion of value added to the BC economy, as measured through GDP (in 2007 constant dollars). This represents 4.5% growth over 2013 and 13.1% growth since 2007.
- In 2014, there were 18,682 tourism-related businesses in BC, down 3.0% from 2013 and up 3.6% from 2004.
- Complimenting this economic growth, unemployment rates dropped 0.5 percentage points from 2013 to 6.1% in 2014, while employment rates increased by 0.6% (led by the goods-producing sector). These changes are indicative of a healthy and growing economy.
- The tourism industry employed 127,500 people in 2014. Tourism-related employment increased by 2.2%, and provides 1 out of every 15 jobs in the province. In 2014, the tourism industry paid $4.3 billion in wages and salaries, up 4.5% from 2013 and a 30.2% increase since 2004.

Figure 4: BC Room Revenues, 2015



BC Stats (2015)

More recent BC tourism performance indicators demonstrated 2015 was an exceptional year of growth for the BC tourism industry. There was an increase of 8% in total overnight, international visitor arrivals, which was mostly due to almost 10% annual growth in visitation from the United States. Overnight arrivals from Asia/Pacific (5%) and Europe (4%) also grew. Also, BC provincial hotel occupancy rates (up 2.2 points), average daily room rates (up 9%), food service and drinking place receipts (up 7%) and passenger volume to YVR (5%) all showed the strength of the tourism industry in 2015. (Figure 8)

Figure 5: British Columbia Tourism Performance, 2015

	2015 Performance	Percent Change Over 2014
International Visitor Arrivals		
Total Overnight	4,925,916	7.9%
USA Overnight	3,263,395	9.6%
Asia/Pacific	1,049,466	4.5%
Europe	473,166	3.8%
Travel Parties to BC Visitor Centres	1,272,014	-7.4%
Room Revenue ($000)	$2,002,682	15.3%
Provincial Hotel Occupancy Rate (Average)	66.1%	2.2 points
Provincial Average Daily Room Rate	$153	8.8%
Food Services and Drinking Places Receipts	$9,541,000	7.2%
BC Ferries Passengers	20,442,794	4.0%
Total Passenger Volume to YVR	20,316,978	4.9%

Source: Provincial Tourism Indicators: 2015 Year-to-Date, February 2016. Destination British Columbia.

2.3.2 Key Markets

In 2015, there were 18.9 million overnight visitors in BC, those visitors spent about $10.3 billion. Over half of the visitors (55%) were BC residents. Visitors from other parts of Canada accounted for 18% of all visits, another 18% were from the United States while international visitors accounted for the remaining 8% of visitor volume. However, international visitors accounted for 38% of visitor expenditures, while Canadian and BC residents accounted for two-thirds (62%) of expenditures. (Figure 9)

Figure 6: BC's Tourism Volume and Expenditure Market, 2015

Source: Destination BC. Values may be subject to revisions as updated data becomes available Domestic estimates are based on a partial year (3/4) of results from the Travel Survey of Residents of Canada. See Appendix 7.3 for more details.

In 2015, Canadian residents took 13.8 million person-trips within their country where they spent at least one night in BC. These domestic trips generated just over $5.6 billion in expenditures. Travel by Canadian residents decreased 6% between 2013 and 2015, while expenditures have decreased 1%.

- Visitation from Ontario and Alberta has decreased by 11% and 16%, respectively since 2013. Alberta and Ontario resident expenditures have both declined 11% over the same period while expenditures by BC residents have grown by 8%.

In 2015, over 5 million international travellers visited Canada and spent at least one night in BC. These travellers spent $4.6 billion during their trips. Overall international visitation increased 16% between 2013 and 2015, while overall expenditures increased 19%.

- The United States is BC's largest international market, accounting for 66% of international visitor volume and 44% of expenditures. Visitation from the US increased 14% between 2013 and 2015 while expenditures increased 16% during the same period. BC's two key US markets – Washington and California – both experienced the same increases in visitation and expenditure. Mexican visitation grew 33% and expenditures grew 37% between 2013 and 2015.
- BC's two key European markets – the United Kingdom and Germany – accounted for 43% and 20% of European visitor volume and 43% and 19% of European expenditures. Both markets have experienced modest growth since 2013; UK visitation increased 5% and German visitation increased 2%. While expenditures also increased by 5% and 6%, respectively.
- BC has five key markets in Asia/Pacific – Australia, China, India, Japan and South Korea. Japanese (28%), Chinese (32%), South Korean (18%) and Indian (30%) visitation increased substantially between 2013 and 2015. Visitation from Australia increased a more modest 7% over the same period. Overall expenditures grew 19% for the Asia/Pacific region in total, the largest gain of all international regions.

2.3.3 Regional Performance and Markets

The Regional Performance chart shows available information to demonstrate performance of the tourism region and Planning Area. (Figure 10)

Figure 7: Regional Performance, 2015

	2015 Performance	Percent Change Over 2014
Travel Parties to BC Visitor Centres - Region	319,140	-31.1%
Gibsons	5,586	-1.8%
Sechelt	8,878	-7.0%
Powell River	5,223	11.3%
BC Ferries Passengers	20,442,794	4.0%
Route 3: Horseshoe Bay to Langdale	1,281,635	4.4%
Route 17: Little River to Powell River	178,983	17.0%
BC Parks Statistics		
South Coast - Day Use Attendance	6,715,298	-9.91%
South Coast - Camping Attendance	512,129	9.24%
Sunshine Coast – Day Use	373976	-37%
Sunshine Coast – Camping	34896	35%
Sunshine Coast – Boating	58590	-6%
Highways Statistics (if applicable)		

Source: Provincial Tourism Indicators: 2015 Year-to-Date, February 2016, Destination British Columbia. BC Parks Statistics Report 2015. BC Visitor Services Statistics Program. BC Ferries.

Destination BC Regional Profile

The West Kootenay/Revelstoke planning area is included in the Kootenay Rockies tourism region, which also includes the East Kootenays to the Alberta border. The region has 3% of BC's population at 146,264 of which 5,700 are employed in the tourism industry in 850 businesses. In 2012, room revenues for the entire region were $81.4 million.

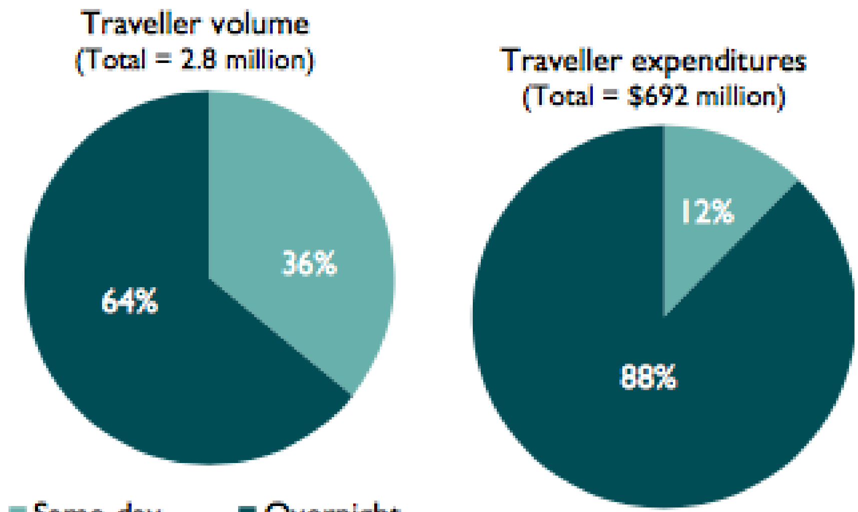
Markets

At the provincial level, Destination BC produced regional profiles for each of the tourism regions in the province. Key findings from the Kootenay Rockies profile include[14]:

- The Kootenay Rockies region received 1.8 million overnight person-visits in 2012 and generated $600 million in related spending (6,758,000 nights).
- When looking just at leisure travellers, the Kootenay Rockies region received 1.1 million overnight visitors, $433 million spending (4,377,000 nights).
- Other Canadian residents make up the greatest share of visitation (56%) and spending (55%) followed by BC resident (27% and 22% respectively).
- On average, domestic travel parties in the Kootenay Rockies region stayed 3.7 nights and spent $132 per night during their trip. US travel parties stayed 3.3 nights and spent $ 239 per night during their trip, and Other international travel parties stayed 4.9 nights and spent $167 per night during their trip in the Kootenay Rockies region.
- Same-day travellers accounted for 36% of visitor volume and 12% of visitor expenditures (Figure 11).

14 Destination BC – Kootenay Rockies Regional Profile (2014) www.destinationbc.ca/getattachment/Research/Research-by-Region/Kootenay-Rockies/

Figure 8: Same day vs Overnight Visitor Volume and Expenditures



Source: Kootenay Rockies Regional Profile, 2014, Destination BC

- BC residents stayed primarily with friends and family (48%) or camping/RV parks (29%)
- Other Canadians, and other international visitors, excluding US travelers, also stayed with friends and families (32% and 35% respectively)
- US residents were more likely to stay in a hotel (33%); 31% of Other international residents also stayed in hotels
- Overnight travellers who spent one or more nights in the Kootenay Rockies region took part in a number of outdoor activities during their trip, including visiting national or provincial parks, camping, hiking/backpacking and golfing. Downhill skiing or snowboarding was included in the 'top five' for US residents (Figure 12).
- Most people travelled in the Kootenay Rockies region during the peak summer months (July to September). However travel occurred throughout the year (Figure 13).

Figure 9: Top Activities on a Trip to Kootenay Rockies Region

	BC residents	Other Canadians	**US residents	**Other international
1	Camping	Hiking or backpacking	National, provincial or nature park	National, provincial or nature park
2	Hiking or backpacking	Camping	Historic site	Historic site
3	Beach	Beach	Museum or art gallery	Museum or art gallery
4	National, provincial or nature park	Boating/canoeing/ kayaking	Camping	Camping
5	Wildlife viewing or bird watching	National, provincial or nature park	Downhill skiing or snowboarding	Zoo or aquarium

*Please note that the activities listed could have taken place anywhere on the trip, not just in the Kootenay Rockies.

**Please note that the following activities were not included in this analysis: visit friends or family, shopping, sightseeing, bar/night club, sport/outdoor activity unspecified.

Source: Kootenay Rockies Regional Profile, 2014, Destination BC

Figure 13: Season of Travel

Season of travel	BC residents	Other Canadians	US residents	Other inter-national
January to March	15%	13%	13%	16%
April to June	15%	16%	21%	28%
July to September	51%	53%	53%	46%
October to December	20%	18%	13%	11%

Source: Kootenay Rockies Regional Profile, 2014 Destination BC

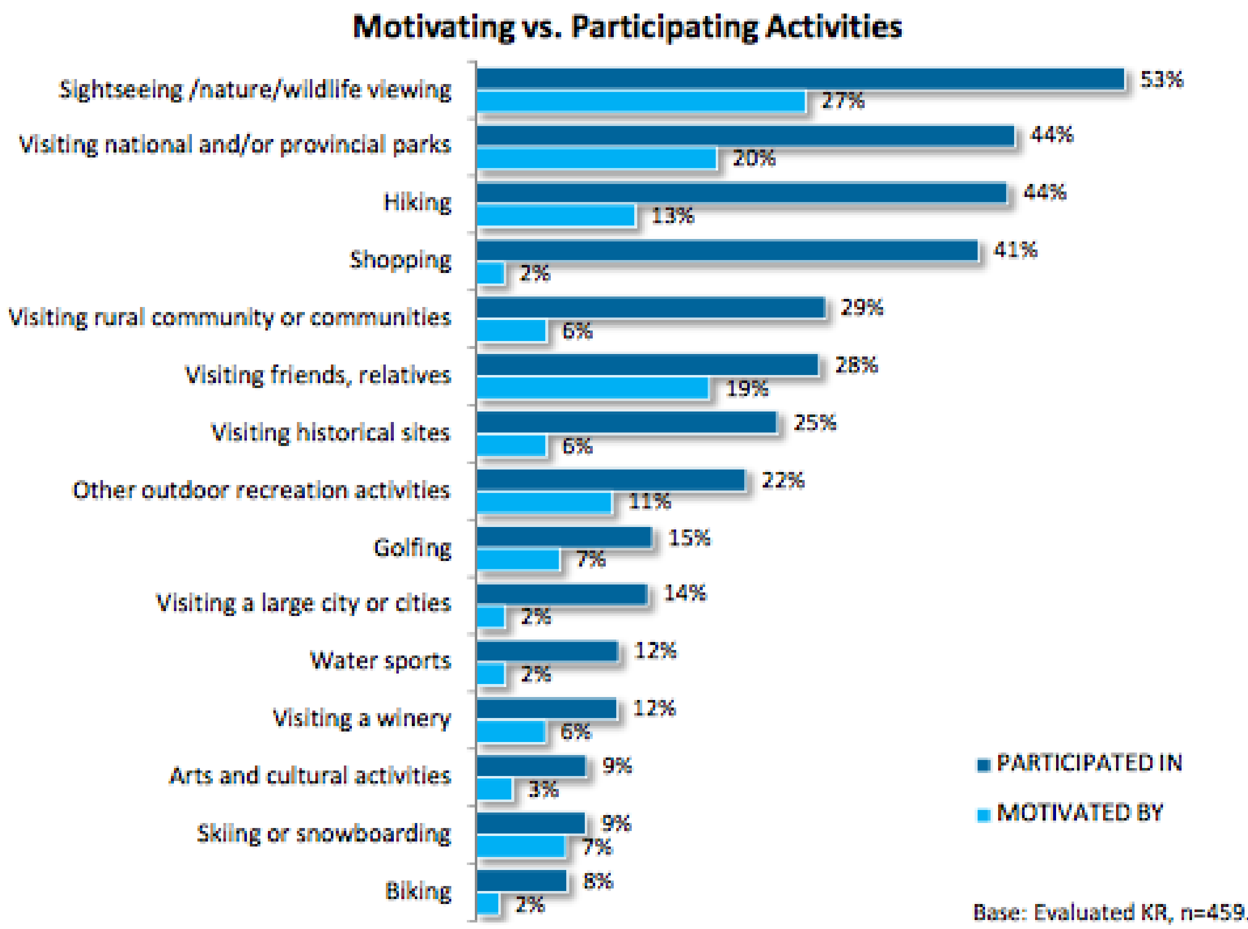
2012 In-Market Research Report

The following are key highlights for the Kootenay Rockies (KR) region taken from the Destination BC *British Columbia In-Market study* conducted with BC, Alberta and Washington state travellers in November 2011 and April 2012.

- Visitors to any region in BC are looking for destinations that offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.
- Respondents from Alberta followed by ‘Other BC’ have the highest familiarity with the Kootenay Rockies region. Eastern Washington respondents are more familiar overall with the region than those from the Lower Mainland of BC.
- Key activities which motivated trips to the Kootenay Rockies were sightseeing, nature, wildlife viewing; visiting parks and visiting friends or relatives.
- It therefore follows that visitors to the region were likely to participate in sightseeing, nature, wildlife viewing; visiting parks, hiking and shopping on their trip.
- Half (49%) of respondents are likely to visit the region in the next two years, most likely for a ‘mini-vacation’ (3-5 nights), followed by a ‘getaway’ (1-2 nights). The majority of future trips to the Kootenay Rockies are planned for summer. Outdoor recreation activities and experiencing scenery and nature are key motivators for future trips.
- The Internet (on a computer as opposed to a mobile device) is heavily relied-upon for pre- trip planning, while information centres and online (at accommodations) are the most popular information sources during trips.
- Preferring to visit a different or international location and lack of interest in visiting or returning to the region were key reasons given by respondents that are unlikely to take a trip to the Kootenay Rockies in the next two years.
- Six-in-ten (59%) of respondents familiar with KR have a positive overall impression of the region, which ranks it 2nd out of the 6 British Columbia Tourism regions, behind Vancouver Island.

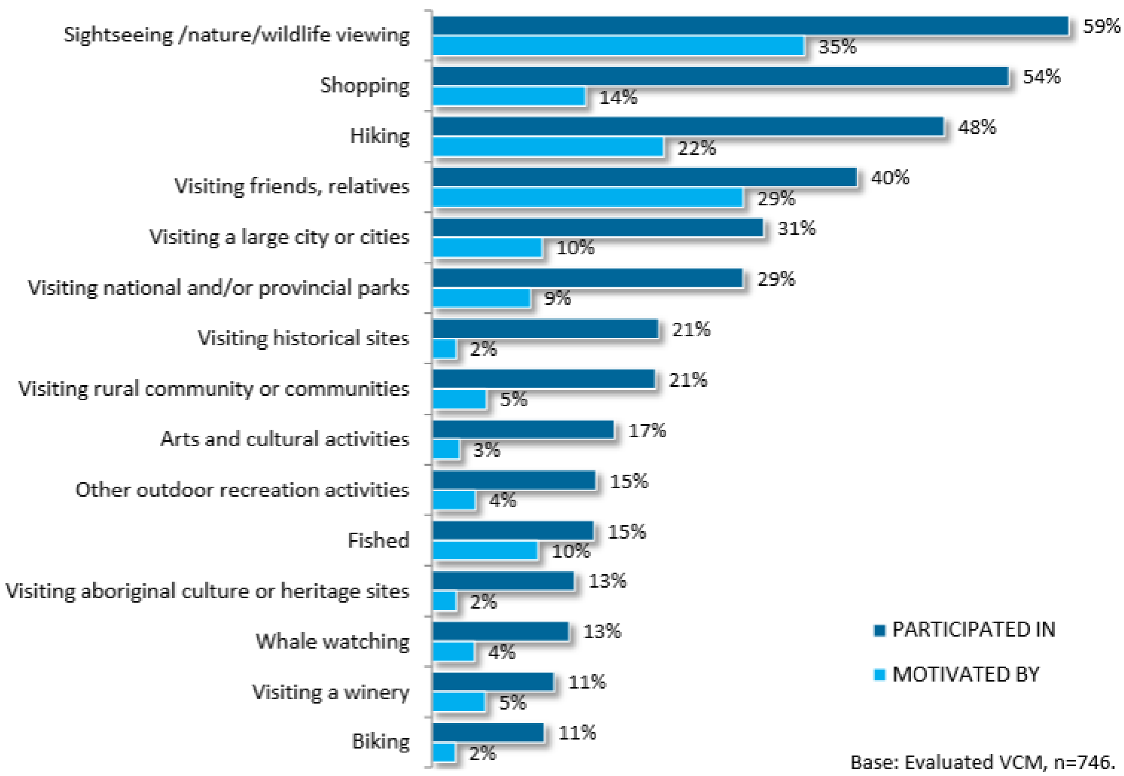
Visitors to Kootenay Rockies destinations were most likely to have participated in sightseeing, nature, wildlife viewing, visiting national/provincial parks, hiking, shopping and visiting rural communities. Other key activities included visiting friends and relatives and visiting historical sites.

Figure 14: KR – Top Activities Participated In, 2011



Visitors to destinations in the Kootenay Rockies participated in a far greater range of activities while on their trip than they were originally motivated by. Sightseeing, nature, wildlife viewing, visiting national/provincial parks, visiting friends and relatives and hiking were the most common trip motivators.

Figure 15 KR – Motivating vs Participating Activities, 2011



Source: 2012 In-market Research – Kootenay Rockies Summary

2.3.4 Visitor Characteristics

The following chart shows the Trip Characteristics for Domestic travellers for each tourism region in BC.

Overnight Trip Characteristics for Domestic Travellers in/to BC

		BC OVERALL	Trip Characteristics by Tourism Region					
			VCM	VI	TOTA	KR	NBC	CCC
BC Residents	Average nights per trip	2.9	2.7	2.8	2.9	3.3	3.0	3.1
	Average party size	1.6	1.5	1.6	1.8	1.8	1.6	1.8
	Parties travelling with kids	15%	14%	15%	18%	16%	17%	18%
	Trip spending (per party per night)	$130	$132	$111	$110	$117	$143	$84
	Spending by category[a]							
	Public transportation[b]	12%	10%	10%	3%	1%	12%	1%
	Vehicle[c]	22%	15%	20%	22%	36%	28%	34%
	Accommodation	23%	26%	22%	26%	18%	25%	24%
	Food & beverage	28%	29%	34%	33%	33%	24%	31%
	Recreation & entertainment	8%	11%	6%	8%	6%	5%	7%
	Retail & other items	8%	10%	8%	8%	6%	6%	4%
Other Canadian Residents	Average nights per trip	5.6	5.6	6.4	4.6	3.5	4.8	7.4
	Average party size	1.6	1.5	1.5	1.7	1.9	1.7	1.7
	Parties travelling with kids	16%	11%	7%	17%	25%	20%	10%
	Trip spending (per party per night)	$155	$171	$156	$141	$154	$129	$125
	Spending by category[a]							
	Public transportation[b]	17%	26%	24%	8%	1%	11%	0%
	Vehicle[c]	14%	8%	14%	16%	21%	23%	51%
	Accommodation	24%	25%	24%	25%	21%	28%	13%
	Food & beverage	28%	25%	25%	31%	32%	28%	27%
	Recreation & entertainment	10%	9%	7%	9%	22%	3%	5%
	Retail & other items	7%	7%	6%	11%	3%	7%	4%

[a] *Spending by category is based on spending per party per night*
[b] *This category includes public and local transportation (plane, bus, boat, train); Canadian air carrier fares removed from data.*
[c] *This category includes the costs of operating private vehicles and/or renting a vehicle.*

2.3.5 Top BC Visitor Experiences

The global travel market is becoming increasingly diverse and segmented. However, most of British Columbia's target consumers share one thing in common: they have an increased desire for travel experiences that express individuality, including travel that offers unique, exotic experiences. There are also travellers who pick their destination based on pre-existing passions and pursuits.

British Columbia's target consumers strongly connect with the unique combination of ocean, rainforest and mountains in British Columbia, as well as the stunning natural beauty and wildlife. Destination BC has identified five iconic experiences that showcase those aspects of British Columbia's consumer brand in a compelling way[15]:

- Rainforests
- Cities in Wilderness
- Skiing
- Canadian Rockies
- Ocean Coast

Destination BC tracks a number of attributes that describe BC as a destination in an annual consumer research study conducted in target North American markets (BC, AB, WA, CA, ON). Survey respondents are asked to select the destination they most associate with a range of attributes. The following are the top ten attributes that are most associated with British Columbia (in no particular order):

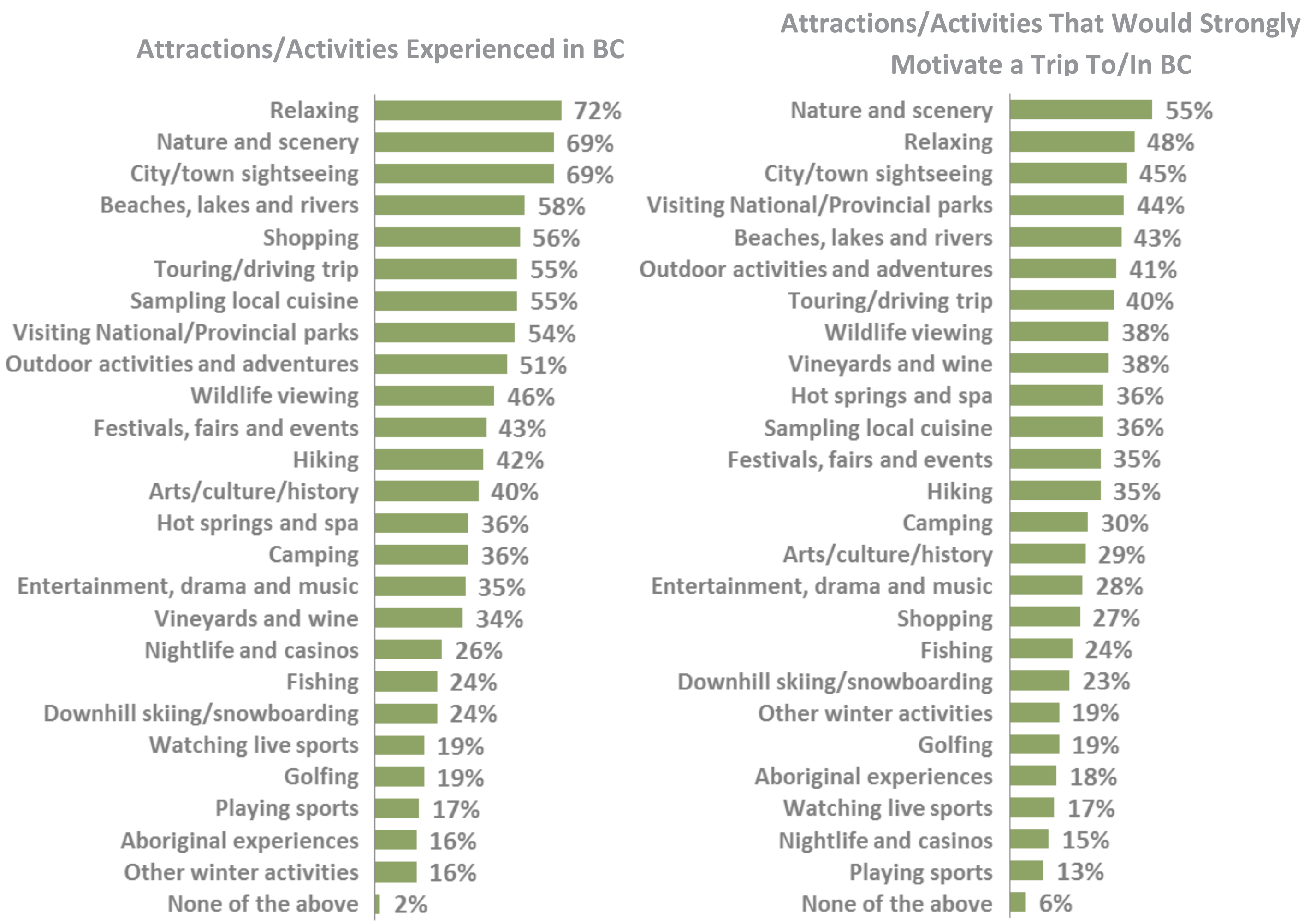
- Has excellent skiing/snowboarding
- Has a unique combination of ocean, mountains and rainforest
- Has beautiful natural scenery
- Has cities in close proximity to nature and wilderness
- Has easily accessible nature and wilderness activities
- Has opportunities to experience aboriginal culture and attractions
- Has lots of opportunity to view wildlife
- Has an incredible diversity of wildlife
- Has lots of great outdoor activities
- Has lots of protected areas, including nature reserves, regional and/or national parks

These top attributes are closely related to the Iconic Experiences and highlight the natural strengths of British Columbia as a travel destination.

In 2014, Destination BC conducted an in-depth study of market characteristics of BC's short-haul (BC, AB, WA) markets. The study asked about activity participation on past trips to/in BC in the last 2 years and activities that strongly motivate trip to BC.

[15] The Destination BC Global Marketing Plan 2017 also identifies key content themes that will be supported, including: Nature & Wilderness, Culture & Lifestyle, Cities on the Edge of Wilderness, Winter/Ski and Touring/Road Trips. Sub-topics include: Brand Iconic Experiences (Rainforests, Cities in Wilderness, Skiing, Canadian Rockies, Ocean Coast), Aboriginal Experience, Accommodation, Attractions, Activities, Food & Drink, Adrenaline Adventure, Soft Adventure, Festivals / Events, and Wildlife Viewing.

Figure 10: Attractions/Activities Experienced and Motivated a Trip



Source: 2014 Destination BC short-haul consumers study. Base: those who have visited in the last two years (n=1,762)
Q1. Below is a list of leisure attractions/activities. In the first column, please select all of the attractions/activities that you have experienced while travelling on an overnight leisure trip in British Columbia in the past two years.
Q2, please select all the activities that you would be strongly motivated to travel in British Columbia to experience (whether or not you have already experienced these activities in British Columbia) on an overnight leisure trip.

Market Profiles

Travellers from Alberta, Washington State, Californian BC residents themselves will remain important markets for the Kootenay Rockies over the next 10 years. As well long haul travellers from Germany, Switzerland, UK, Netherlands and China have been identified by industry stakeholders as having potential for long-term growth in the West Kootenay/Revelstoke planning area.

Destination BC provides market research related to visitor characteristics by their area of origin as well as by the activities in which travellers participate. Detailed reports are available on http://www.destinationbc.ca/Research.aspx and summary highlights are provided below:

2.3.6 *British Columbia Residents*

- British Columbians took 10.6 million overnight trips within BC in 2014
- All age groups are represented – 37% are aged 18-34 years; 36% are aged 35-54 years
- 42% were travelling for leisure; 44% were travelling to visit friends/family
- Average travel party size of 2.7 people
- Average trip length 2.8 nights; 64% staying 1-2 nights; 28% staying 3-5 nights
- 84% travel by auto/camper/RV
- 6% visit Kootenay Rockies; 41% visit Vancouver Coast & Mountains; 24% visit Vancouver Island; 20% visit Thompson Okanagan regions
- Travel throughout the year with peaks in July/August/September
- Beaches, hiking, visiting friends/family and camping are most popular activities
- 26% do not need accommodation; 38% book their accommodation directly
- Explorer Quotient Traveller Type: 36% are Gentle Explorers; 17% are Free Spirits; 16% are Authentic Experiencers; 10% are Cultural Explorers

2.3.7 *Albertan Travellers*

- Alberta travellers took 2.5 million overnight trips to BC in 2014
- All age groups represented; 39% are aged 18-34 years; 40% are aged 35-54 years
- 55% were travelling for leisure; 35% were travelling to visit friends/family
- Average travel party size of 3.1 people
- Average trip length 4.4 nights; 36% staying 1-2 nights; 40% staying 3-5 nights
- 75% travel by auto/camper/RV; 22% travel by air
- 36% visit Kootenay Rockers; 27% visit Thompson Okanagan; 21% visit Vancouver Coast & Mountains; 4% visit Northern BC
- Travel throughout the year with peak travel in July/August (42%)
- 26% do not need accommodation; 38% book their accommodation directly
- Hiking, beaches, visiting parks and boating are most popular activities
- Explorer Quotient Traveller Type: 38% are Gentle Explorers; 21% are Free Spirits; 13% are Authentic Experiencers; 12% are Cultural Explorers

2.3.8 *Washington State Travellers*

- Washington State travellers took 1.2 million overnight trips to BC in 2014
- 62% of travellers are aged 45 years or older; 45% are aged 55+ years; 23% are 65+years
- 63% were travelling for leisure; 24% were visiting friends/relatives
- Average travel party size of 3.0 people
- Average trip length of 3.0 nights – 76% stay 1-3 nights
- 83% travel by auto
- 5% visit Kootenay Rockies; 75% visit Vancouver, Coast & Mountains; 20% visit Vancouver Island
- Travel throughout the year with small peaks in July/August
- 16% do not need accommodation; 38% book accommodation directly; 21% use an OTA; 19% still use a travel agent
- Shopping, sightseeing, visiting friends/family, outdoor activities are the most popular activities
- Explorer Quotient Traveller Type: 34% are Gentle Explorers; 18% are Authentic Experiencers; 15% are Free Spirits; 10% are Cultural Explorers

2.3.9 *California*

- California travellers made 419,000 overnight trips to BC in 2014
- 62% of travellers are 45 years or older; 42% are 55 years or older; 20% are 65+years
- 57% are travelling for leisure; 23% are visiting friends/relatives; 13% are travelling for business
- Average travel party size is 2.5 people
- Average trip length is 5.7 nights; 47% stay 1-3 nights; 34% stay 4-6 nights
- 3% visit Kootenay Rockies; 81% visit Vancouver, Coast & Mountains; 30% visit Vancouver Island
- Travel peaks in June and July; followed by August/September/October
- 56% arrive by plane; 24% arrive by auto; 10% arrive by boat
- 23% of travellers book their air directly; 19% book air through a travel agent; 16% use an OTA
- 16% of travellers from California do not need accommodation; 38% book their accommodation directly; 21% book accommodations through an OTA and 19% book accommodation through a travel agent
- Sightseeing, shopping, visiting friends/family and visting parks are the most popular activities
- Explorer Quotient Traveller Type: 29% are Free Spirits; 28% are Gentle Explorers; 19% are Authentic Experiencers; 12% are Cultural Explorers

2.3.10 *United Kingdom*

- United Kingdom travellers took 192,000 overnight trips to BC in 2014
- 64% of travellers are aged 45 years or older; 46% are aged 55+ years; 25% are 65+years
- 56% are travelling for leisure; 32% are visiting friends/relatives
- Average travel party size of 2.3 people
- Average trip length of 12.5 nights; 37% stay 7-13 nights; 21% stay 4-6 nights; 17% stay 1-3 nights; 13% stay 14-20 nights
- 13% visit Kootenay Rockies; 77% visit Vancouver, Coast & Mountains; 39% visit Vancouver Island; 29% visit Thompson Okanagan
- Travel peaks in July/August with a smaller peak in February (likely ski related); some travel still occurs in April/May/June
- 46% book their flight directly; 26% use a travel agent for flights; 22% use an OTA
- 23% do not need accommodation; 30% book their accommodation directly; 26% use a travel agent; 17% use an OTA
- Sightseeing, shopping, visiting parks, visiting friends/family are most popular activities
- Explorer Quotient Traveller Type: 24% are Gentle Explorers; 16% are Authentic Experiencers; 13% are Free Spirits; 10% are Cultural Explorers; 10% are Cultural History Buffs

2.3.11 *Germany*

- German travellers took 82,000 overnight trips to BC in 2014
- 38% of travellers were 20-34 years old; 63% were 44 years or younger
- 66% are travelling for leisure; 17% are visiting friends/relatives
- Average travel party size of 2.1 people
- Average trip length is 14.9 nights; 32% stay 7-13 nights; 21% stay 4-6 nights; 19% stay 14-20 nights
- 25% visit Kootenay Rockies; 83% visit Vancouver, Coast & Mountains; 43% visit Vancouver Island; 43% visit Thompson Okanagan; and 16% visit Northern BC
- Strong travel peaks in July and August
- 39% book their flights through a travel agent; 28% book flights directly and 27% use an OTA

- 13% do not need accommodation; 39% book accommodation through a travel agent; 18% book accommodation directly; 23% use an OTA
- Sightseeing, shopping, visiting parks, outdoor activities and visiting historic sites are most popular activities
- Explorer Quotient Traveller Type: 17% are Cultural Explorers; 15% are Virtual Travellers; 14% are Rejuvenators; 13% are Authentic Experiencers; 13% are Group Tourists

2.3.12 China

- In 2014, China continued to be BC's second largest International market in 2014 with an estimated 211,000 travellers spending approximately $242.7 million in tourist receipts.
- Travellers from China tend to be younger (27% are 20 to 34) and travel predominantly to visit friends and family for extended periods, staying an average of 32.5 nights and spending $1,199 per person (average party size is 2.1 people). 97% of China travellers visit the Vancouver, Coast and Mountains region. They tend to travel in spring and summer, with some travel in January.
- Top 10 activities include, in order: Sightseeing, Shopping, Visit Friends/Relatives, Visit Parks, Zoo/Aquarium, Historic Sites, Museum/Art Gallery, Outdoor Activities, Casino, Festival/Fairs.

2.4 Visitor Characteristics – By Activity

Destination BC also provides market research on visitor characteristics defined by the activities they participate in while travelling. Detailed reports are available on http://www.destinationbc.ca/Research.aspx and summary highlights of the most relevant activities for the West Kootenay/Revelstoke planning area are provided below:

- Hiking, April 2009
- Downhill Skiing/ Snowboarding, May 2014
- Cycling and Mountain Biking, April 2009
- Touring, May 2014
- Outdoor Adventure, May 2014
- Golf, October 2009
- Fishing, April 2009
- Heritage, April 2009
- Aboriginal Cultural Tourism (various dates)

Highlights of this research by activity are as follows:

2.4.1 Hiking (2009)

- Canadian day hikers skew female; Canadian overnight backpackers skew male
- American hikers – both day and overnight skew male
- Majority are aged 18-34; American hikers have larger number of older participants aged 45 years+
- Well educated; moderate to affluent income
- Hiking travellers also enjoy visiting natural wonders, swimming in lakes (Canadians) and visiting heritage sites/museums (Americans)

2.4.2 *Cycling and Mountain Biking (2009)*

- Male skew to those participating in cycling activities, particularly from US (63% male); Canadian 55% male
- 40% of Canadian cyclists are aged 18-34; US participants older with the largest group aged 45-54 (30%)
- Canadian travellers motivated by mountain biking skew younger and male with 42.8% aged 18-34 years and 74.5% male. They are affluent and educated with 46.6% having household incomes of $100,000 or more and 64.2% having completed post secondary education
- US travellers motivated by mountain biking are 73.8% male;
- Majority (48.3%) of motivated US mountain bikers are aged 18-34 years; like their Canadian counterparts, they are affluent and well educated with 32.7% having household incomes of $100,000 or more and 59% having completed post secondary education
- US overnight touring cyclists are skewed male as well – 82% of those travellers motivated by overnight touring are male
- Canadian and US cycling travellers can be considered frequent travellers when compared to the overall travelling population
- Cycling travellers also enjoy swimming in lakes, strolling the city/seeing buildings, visiting parks, natural wonders, sitting on a beach/sunbathing, visiting historic sites. Many travellers who participate in cycling also enjoy hiking.

2.4.3 *Touring (2014)*

- Approximately one-third of Canadian touring travellers are aged 18-34 years; US touring travellers tend to be older with approximately one-quarter over the age of 65 years;
- Approximately one quarter of both Canadian and US touring travellers are in adult-only households
- American travellers more likely to take guided tours than Canadian travellers
- Touring travellers are also interested in city strolls, visiting national/provincial parks, historic sites, natural wonders

2.4.4 *Heritage (2009)*

- Canadian heritage travellers tend to be younger than their US counterparts – 31% of participating Canadians are aged 18-34 years; largest group of participating Americans is over 65 years of age (25%)
- 32% of US travellers motivated by heritage are over age 65; only 15% of motivated Canadian heritage travellers are in this same age group
- Motivated American heritage travellers are relatively affluent when compared to the overall population of travellers to BC and are on average more affluent than motivated Canadian heritage travellers
- Heritage travellers also enjoy city strolls, visiting national/provincial parks, sunbathing/sitting on a beach, visiting well-known natural wonders

2.4.5 *Downhill Skiing / Snowboarding (2014)*

- Male skew for travellers from both Canada and the US participating in and motivated by skiing/snowboarding; this skew is more heavily pronounced in the American visit base; snowboarders also skew more heavily male.
- Nearly half of Canadians are younger (18-34 years); One third of American travellers are in this same age group; more American than Canadian travellers are in the 34-55 year category

- American and Canadian skiiers and snowboarders are affluent and well educated – this is more pronounced with motivated skiiers
- Frequent travellers; BC is rated very highly by both Canadians and Americans
- Other activities enjoyed by Canadian alpine travellers– swimming, sunbathing, sitting on a beach
- Other activities enjoyed by American alpine travellers – strolling through a city, visiting heritage sites
- Activities also enjoyed by Canadian and American alpine travellers include swimming in the ocean, same day hiking trips, visiting National/Provincial parks

2.4.6 Fishing (2009)

- Predominately male; 18-34 and 45-54 years of age
- Reasonably affluent, educated
- Majority come from adult-only households
- Fresh water fishing dominates Canadian market (BC residents have a higher salt water fishing rate)
- Other activities – swimming, motor boating
- Show some interest in 'natural wonders', visiting national/provincial parks

2.4.7 Golf (2009)

- Two thirds of golf pleasure travellers from both Canada and the US who had been to BC in 2004/05 and participated in a golf activity were male – this male skew is even more pronounced amongst those motivated to travel for a golf activity
- Canadian travellers who had participated in a golf activity while on a trip were younger than their American counterparts. Nearly 49% of Canadian participating golf travellers were aged between 18 and 44 years compared to 38% of Americans
- Participating golf travellers tend to be high-income earners with over 43% of Canadians and over 50% of US travellers earning $100,000 or more per annum. The proportion is even high for those motivated to travel by golf activities
- The majority of golf travellers are well educated
- Canadian travellers motivated by golf tend to be older than the general population of Canadian travellers to BC with 37% aged 55 years or older
- Other popular activities in addition to golf include sunbathing/sitting on a beach; swimming in lakes; strolling to see city buildings; visiting a nature park; visiting historic sites/buildings; and swimming in oceans
- Hiking skiing and fishing were the most common complementary sports-related outdoor activities of interest to golfers
- Impact factors for US golfers when choosing a destination include: quality of golf course; value for money; availability of multiple courses and weather conditions.

2.4.8 Outdoor Adventure (2014)

- In 2005, over 1.2 million people participated in British Columbia commercial outdoor adventure tourism, an increase of 24% from 2001
- US visitors (35%) and BC residents (29%) are the heaviest participants in outdoor adventure tourism in BC
- The most popular outdoor adventure activities for Canadians are day hiking (18%), road biking (16%) and car camping (12%)

- Approximately two-thirds of Canadians enjoy being in the wilderness, however a large portion has fears about remoteness
- British Columbia's outdoor adventure travellers are younger than other travellers, with an average in the mid-30s. The majority are male and single / never married. More than a third are university educated
- Generally, BC males are significantly more likely to participate in road biking, camping, freshwater fishing and mountain biking whereas women are more likely to participate in soft outdoor adventure activities including beach activities, nature viewing/ scenic photography, bird watching and whale watching
- US residents who are outdoor enthusiasts are slightly more likely (55%) to be male, almost half (49%) are married, and 38% have a post-graduate degree/college diploma

2.4.9 Aboriginal Cultural Tourism

- In 2010, 3.7 million overnight visits to BC included an Aboriginal cultural experience – almost double the number from 2006
- Approximately half of these visits are by Canadians
- Average Aboriginal cultural tourism visitor to BC tends to be female, middle to late aged, well-educated and earns an upper-middle income
- Aboriginal cultural tourism visitors under the age of 50 prefer active experiences such as canoeing, kayaking, dog-sledding and horseback riding while visitors aged 50+ prefer less vigorous experiences such as hiking, walks, nature observation and indoor activities

2.5 Economic Trends

2.5.1 Overall Economic Performance

While some travel is required for business or personal reasons, tourism tends to be a discretionary purchase that depends on personal disposable income. When economies are strong, tourism spending grows more rapidly than consumer spending as a whole. Likewise, during recessions, tourism can decline quickly and substantially.

Overall, over the next several years[16], advanced economies are projected to increase marginally, with declined growth in Japan due to a planned consumption tax impacting other advanced economies. Three risks that influence global growth include lower commodity prices, a generalized slow down in emerging market economies and international ramifications of developments in China's rebalancing. Emerging economies have experienced five years of declined economic growth, notably Brazil and Russia that are in recession. Also, oil prices fell by about 50% in 2015 compared to 2014, with a forecast of another 10% decline in 2016 and only modest recovery in the near future. This decline is a result of three factors: increases in oil supply, weaker global demand and improved energy efficiency. For oil-exporting countries (or provinces, like Alberta) this could force more significant cuts in spending.

[16] This summary draws information from the World Economic Outlook report (April 2016) published by the International Monetary Fund (IMF); as well as from the Organisation for Economic Co-operation and Development (OECD).

2.5.2 Exchange Rates

The Tourism Industry Association of Canada (TIAC) demonstrated that the impact of exchange rates on U.S. travel to Canada is unclear.[17] A variety of factors impacted the decline of Americans visiting Canada through the mid to late 2000s and early 2010s (e.g., poor economy, border security issues, passport requirements, SARS) in addition to currency fluctuation. During this period, U.S. same-day and overnight travel declined, but isolating only one influencing factor is impossible. It is likely the recent rise in visitation is influenced more by a strong rebound in the economy and favourable gas prices than exchange rates. This is also supported by past research that demonstrates low awareness of the value of the Canadian dollar by American citizens.

The impact is clearer for Canadian travel as a lower Canadian dollar tends to keep Canadians at home at least as much as incenting Americans to travel to Canada.

2.6 Consumer Trends

Trends are patterns of activity – social, economic, environmental, political and/or technological – that will affect the future over the next 20 years. Within the last decade, there have been significant shifts in consumer preferences that have affected travel choices. A summary of the most relevant shifts is outlined below with Province wide implications for destination development identified that are applicable to the planning area as well as additional specific implications for the West Kootenay/Revelstoke visitor destination. Section 2.8 describes how BC has shifted its tourism management approach to adapt to these trends.

Overall, the impact of the various economic, demographic and attitudinal trends is that the tourism market will become more segmented, and product demand will become more diverse.

Consumer Trends	Description	Province-Wide Implications + *Additional Specific West Kootenay/Revelstoke Implications*
Shifting Demographics / Millennials	By 2030, the world's population is expected to increase 20% from today's 6.9 billion to 8.3 billion. Many developed countries have now progressively ageing populations. Rural-to-urban migration continues to be a significant pattern within many countries. Millennials, also known as Generation Y, are the demographic cohort born between the early 1980s and the early 2000s. Millennials are one of	Tourism needs to account for the preferences and needs of older travellers who may have a 'younger' outlook but may need nearby medical care. Also, seasonal travel patterns may shift as older travellers have the freedom to travel outside of traditional peak periods. Increases in multi-generational families and solo travellers will require more flexible options for transportation, accommodation, and services.

[17] http://tiac.travel/_Library/TIAC_Publications/New_ANNUAL_REPORT_EN.pdf

Consumer Trends	Description	Province-Wide Implications + *Additional Specific West Kootenay/Revelstoke Implications*
	the largest generations in history are emerging as important to the tourism industry due to their sheer size and contribution to international visits.	*Increasing demand for search and rescue services* *Increasing demand for softer outdoor adventure; year round experiences and weather insensitive offerings (possibly themed around arts, culture, history and heritage)* Destinations need to plan for millennials unique travel preferences, including their preference for: ○ Experiences that align with social equality, personal growth, authenticity, innovation and environmental consciousness, and ○ Automatic and essential use of technology.
Shifting Values and Attitudes	Health, environmental sustainability, and ethics values are more prevalent and creating higher demand for certain products.	BC is well endowed with natural beauty and pristine wilderness, which is a draw for international and domestic travellers. Finding a balance between encouraging visitation to BC's natural assets and preserving them will be critical.
Mobile Technology	The use of mobile and other technology has exploded, with most travellers now having near-constant access to web enabled devices. Consumers increasingly place a huge value on being connected and use technology for sharing ideas, getting news, researching, communicating with friends and industry.	For destinations, this means an opportunity to reach travellers both before and during their trip and draw them off the traditional tourist path. Businesses and destinations need to adapt to the continued innovation and increase in the use of mobile devices by ensuring connectivity and online information sources. *Continued investments in connectivity are needed throughout the planning area including services such as wifi at ferry landings*
Transportation Innovation and Technology[18]	New transportation technologies are emerging, including connected and autonomous vehicles, alternative fuels, keyless fleet management and traffic analytics. Connected technology focuses on wireless communication: vehicle-to-vehicle, vehicle-to-pedestrian and vehicle-to-infrastructure.	Transportation concepts, policies and legislation is rapidly evolving. New technology for on-road communications will dramatically change how vehicles operate, provide information and capabilities for better, real-time traffic management and provide enhanced traveller information.

[18] http://www.govtech.com/transportation/How-Transportation-Technologies-Will-Change-Everything-.html

Consumer Trends	Description	Province-Wide Implications + *Additional Specific West Kootenay/Revelstoke Implications*
Advocacy / Social Media	Recommendations and stories from other travellers is the most influential source of information for travel destinations, with positive word of mouth driving travellers to take action. Advocates are believed to represent up to 25% of the consumer base with the potential to influence the remaining 75%.	Traveller advocacy begins with an experience. Focusing on developing positive and remarkable visitor experiences, products and services will have a greater impact than marketing tactics alone. Local destinations, tourism businesses and communities all gain from leveraging traveller advocacy.
Travel Information Sources	Different consumers are at different stages of travel decision-making and require different information. Awareness and inspiration occur mostly through traditional media and word of mouth; trip-planning through on-line web-sites and traveller review sites. Social networks are still an occasional planning tool for most but are growing in importance.	Visitor services must extend beyond bricks-and-mortar locations to take advantage of the ability to connect with visitors via new digital information and servicing opportunities. Societal trends and specifics around individual trips are always changing so the landscape of trip planning and visitor services will continue to evolve.
Sharing Economy	Travel disrupters such as sharing economy organizations like Airbnb and Uber are changing the travel landscape. Travel disrupters have led to more traveller choice for accommodation and transportation trip components.	As travellers are able to experience destinations from a local's perspective, more residents are able to get involved with and benefit from tourism. These alternatives present an opportunity for destinations that lack traditional infrastructure like large hotels and transportation systems. *However, the impact of rentals being taken out of long-term and converted to nightly rental must be managed to ensure continued affordable housing for staff and new entrepreneurs.*
Customer Service / Personalization	Technology has shifted power from institutions to the individual consumer and at the same time, consumers are more cost-conscious. Businesses have a new focus on providing personalized customer service at a lower cost, e.g., online self-service, online chat and facilitation of service from online communities. Increasingly, customers are	Customers increasingly expect continuity and best-practice service between customer service channels. This expectation has been extended to the tourism industry. Consumers will expect this capability throughout their travel experience, from the smallest to largest businesses and destinations.

Consumer Trends	Description	Province-Wide Implications + *Additional Specific West Kootenay/Revelstoke Implications*
	shopping across multiple locations – in-store/person and devices – desktops, smartphones and tablets.	
High Quality, Authentic Experiences	The last decade has witnessed growing demand for vacations that offer authentic opportunities to experience the culture, natural attributes and unique activities of the local destination as well as enrich the traveller's life. This is particularly true for the emerging millennial market. There has been a growth in the awareness and availability of aboriginal tourism experiences throughout BC, with efforts led by Aboriginal Tourism Association British Columbia (AtBC).	Destinations should understand and track components of remarkable experiences in BC: unless the tourism product meets the needs and expectations of visitors, the destination cannot realize its full potential. One way to do so is to measure Net Promoter Score. Two critical drivers for NPS include the natural environment and the supporting tourism infrastructure. Ensuring attributes of the natural environment are maintained and protected will support continued interest in BC as a travel destination.
Value, Staycations and Time Poverty	Travellers continue to place greater emphasis on achieving greater value for money when decision-making and purchasing. The 2015/16 fall of the Canadian dollar has led to many Canadians to avoid travelling to the U.S., but stay at home or within Canada. In some markets and some demographic segments, it appears that populations are feeling greater pressures on leisure time, leading to more frequent shorter trips.	Despite increases in wealth, people do not necessarily feel wealthier and continue to seek budget travel options. BC is not perceived as an inexpensive, or 'value' destination which drives the importance of top quality experiences facilitated by outstanding visitor services. The "time poor" consumer generally wants to maximize their 'value for time' with quick purchases, fast check-ins, easy transportation logistics, and option activities during trips.

2.7 Destination Management Trends and Policy Issues

Management Trends	Description	Implication
Shifts in Role of DMO	DMOs continue to evolve their role in response to changing consumer behavior and competitive pressures.	Destination Marketing Association International (DMAI) documented three main groups of action by DMOs in response to evolving trends. They include: • Dealing with the New Marketplace: Shifting from broadcast communication to engagement with travellers. • Building and Protecting the Destination Brand: More emphasis on the quality experiences and destination advocacy, management and development. • Evolving the DMO Business Model: Working together with public and private sector partners to build new business model for DMO. *Relationships between DMO's and across all communities in the planning area regardless of whether they have a dedicated DMO will continue to be important to the overall delivery of remarkable visitor experiences.*
Tourism Marketing Trends	DMOs have evolved their marketing strategies and initiatives to meet shifting consumer preferences. There is a new focus on digital, mobile, social advocacy, personalization, outstanding customer service, authentic experiences, partnerships and alignment with other agencies.	Destinations should ensure development activities align with regional, provincial and national branding and marketing initiatives. Also, destination development activities should focus on remarkable, authentic experiences that surpass visitor expectations in order to encourage repeat visitors and positive word-of-mouth.
Visitor Services Trends	An increasing number of travellers plan their trips and get visitor information online. Smartphones have accelerated this trend, with instant information available on-the-go, thus causing rapid drops in the number of visitors at physical visitor centres.	Destinations need to consider a multi-channel approach to providing visitor services. The traditional bricks-and-mortar approach of welcoming visitors at visitor centres no longer has the broad economic impact that it once did. *Strong relationships and cross-promotion by Visitor Centres throughout the planning area can contribute to longer lengths of stay.*
Competition	Global competition is fierce. Mature destinations are embracing the value of tourism while emerging destinations increase their competitiveness and target new markets. Also, locally, there is growth	To maintain and grow market share, BC tourism businesses will need to be accessible and accommodating to these markets, and our messaging must be relevant to this audience.

Management Trends	Description	Implication
	in the number of BC destinations looking to tourism to increase their local economy.	
Climate Change and Tourism	Global warming impacts to the tourism industry include: • Retreating glaciers, milder winters and reduced snowfall. • Rising sea levels on coastal areas. • More frequent / intense forest fires. • Changes in the natural landscapes, parks and protected areas. • Impacts on wine producing regions, marine environments and fisheries, and species migration, decline extirpation.	The industry has a responsibility to reduce its own climate change footprint by undertaking various infrastructure retrofit, management, operational and programming changes to reduce energy and water use and overall greenhouse gas emissions. Destinations should consider climate change while planning tourism infrastructure and products.
HR/Labour	The market for tourism employment, both globally and in Canada, is expected to face considerable workforce shortages in the future. BC's tourism industry is expected to have 101,430 job openings by 2020, affecting the food and beverage services, recreation and entertainment industry sector.[19] Changes to the Temporary Foreign Worker (TFW) program have restricted the capacity and ability, in some cases, to make use of the program within the tourism industry.	Local tourism businesses and destinations will continue to evolve to attract a sufficient labour force, including: • Raising wages to attract more employees. • Highlight opportunities for advancement to prospective employees; workers aged 15 to 24 years were twice as likely to remain with their employer when given opportunities for advancement. • Individual businesses can increase annual vacation days from two weeks • Identifying underused labour pools including mature workers, persons with disabilities and new immigrants. *Many businesses in the planning area are seasonal so opportunities to create 12 months of employment across several businesses (as is currently being piloted by Kootenay Rockies Tourism with Whitewater Ski Resort/Nelson/Selkirk College) should continue to be explored.*

[19] Source: www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx

Management Trends	Description	Implication
Land Use	Increasing competition among resource industries, competition within land-based tourism sectors and increasing visitor volume could lead to pressure on land-based tourism policies and businesses.	Elements of BC's natural environment are seen as important reasons to recommend BC as a destination and ultimately travel again. Ensuring these attributes are properly maintained and protected will support continued interest in BC as a travel destination. *The potential for conflict on the land base leading to less than remarkable visitor experiences has been noted in the planning area as a significant constraint to destination development. This conflict may be between motorized/non-motorized user groups, public vs. commercial tenure holders or across industries such as forestry. There is keen interest in a process to resolve these conflicts.*
Sharing Economy Emerges	Travel disrupters such as sharing economy organizations like Airbnb and Uber are changing the travel landscape and providing more value and choice to consumers.	Travel disrupters have led to increased competition with existing, traditional travel businesses (e.g. taxis, hotels), which, along with concerns for traveller safety and fair commerce, has led to review of existing regulation and policies.

2.8 BC Tourism Policies

2.7.1. National and Provincial Industry Association Policy Recommendations

TIAC suggests public policy challenges in three key areas are inhibiting tourism growth in Canada. TIAC recommends the following shifts:

1. Competitive and sustainable long-term funding for Destination Canada.
2. More competitive tax and visa policy.
    1. Aviation Taxes & Fees: Canada is a "Fly-to" destination – and the cost structure is a barrier to success. Airport rents, fuel taxes and security fees have rendered Canada 105th in the world for aviation cost structure according to the World Economic Forum.
    2. Visas & Border Issues: Facilitating the process of crossing the Canadian border is essential for generating more business and leisure travellers: improve border access and infrastructure; build on pre-clearance services and trusted traveller programs; and build an effective visa system to encourage visitors from key emerging markets including Brazil, Russia, India, China and Mexico.[20]

[20] On June 28, 2016, the Government of Canada announced it will eliminate the need for visitor visas from Mexico. http://pm.gc.ca/eng/news/2016/06/28/canada-lift-visa-requirements-mexico

3. Investments in tourism products owned by federal and provincial governments (e.g., parks, museums and heritage areas), and renewal of support for attractions and festivals creates urgencies for travellers to choose Canada.[21]

TIABC has identified these four priority policy challenges in British Columbia:[22]

- Private Room Rentals in BC: As short-term, room rentals in private homes have grown exponentially as a trend, it is critically important to have regulations introduced within each community. The tourism industry in BC continues to lose potential hotel tax revenue and now many resort communities, particularly those with seasonal employees, are affected by lack of available rental accommodation for staff. TIABC's policy recommendations include processes for local and provincial government to address the tax and compliance issues.
- Ferry Transportation in BC: As over one million people live in communities only accessible by ferry or air, it is critically important for BC to have an affordable, high quality ferry system serving visitors, and the businesses and communities that depend on these visitors. Since evolving into a more independent agency in 2003, the ferry system has focused on recovering an increasing portion of costs for operations and capital, which has resulted in average fares increasing by approximately 55% to 100% over a ten-year period. TIABC's policy recommendations include fixed-link solutions, adjusting capacity on profitable routes and ensuring adequate public funding support for BC Ferries.
- Formula Funding for Destination BC: It is critically important to have a sustainably and competitively resourced destination marketing organization in BC and Canada. Destination marketing exists because the private sector and policy makers recognize that the tourism industry is comprised largely of small and medium sized businesses that lack the ability to market into the competitive global market place on their own. TIABC's policy recommendations include dedicated formula-funding for tourism marketing at the provincial and national level. The Province recently announced that Destination BC's current funding of $50 million per year is protected with the opportunity to grow this by 2% per year cumulatively for the next five years (a potential increase of $5 million over this timeframe)
- Canada-U.S. Pre-clearance: TIABC recognizes the critical importance of access from British Columbia's most important international source market, the United States. With sustained advocacy, smart pilot projects and effective industry on government prioritization, British Columbia can position itself at the front of the line to operationalize the historic Agreement on Land, Rail, Marine and Air Transport pre-clearance as part of the Beyond the Board Action Plan. TIABC's policy recommendations ensure that the Province of BC work with both the Government of Canada and across the border to ensure efficient passage of the treaty.

2.7.1. Land Use Policies

Crown land is land that is owned by the provincial government and includes any lakes or rivers that cover the land. This land is available to the public for a wide range of uses including such things as tourism and recreation, forestry, mineral extraction, oil and gas extraction and production, agriculture and a range of other

[21] http://tiac.travel/advocacy_global.htm

[22] TIABC. 2016. Personal Communication.

uses for economic or non-economic activities. The use of Crown land in BC is allocated according to the following Crown Land Allocation Principles:

1. Crown land values are managed for the benefit of the public.
2. Economic, environmental and social needs and opportunities are identified and supported.
3. The interests of First Nations' communities are recognized.
4. Decisions are timely, well-considered and transparent.
5. Public accountability is maintained during the allocation of Crown land.

These principles provide guidance to public officials who are involved in making decisions related to the allocation of Crown land. Details about tourism policy on Crown Land are found in Appendix 7.4.

2.9 Destination Management and Marketing Focus in BC

There have been significant shifts in the strategic direction of tourism in BC, including from the Ministry of Jobs, Tourism, and Skills Training with the Gaining the Edge Strategy, as well as from Destination BC's corporate strategy and 2017 Global Marketing Plan. Shifts include:

- BC's tourism system is evolving to become better aligned in destination development, marketing and use of the BC destination brand.
- New roles for the regional tourism organizations and business advisors with an increased focus on destination development. New roles for the sector marketing organizations (e.g., mountain bike, ocean boating, etc.) with an increase role in marketing provincially;
- An increased number of 2% tax funded communities through the Municipal and Regional District Tax (MRDT). Increase of allowable MRDT tax from 2% to 3%, which may inject an additional $10 million to $20 million into the tourism system (currently ~ $30 million collected by over 50 MRDT communities in BC).
- Increasing focus on content creation, data-driven on-line marketing, advocacy, social media and inspiring travel via passions. (In 2017, Destination BC will focus on the following passions: ski enthusiasts, mountain bikers, fishers/anglers, wine/culinary (breweries, wineries and dining) and golf).
- Increasing use of Explorer Quotient (EQ) in marketing and destination development efforts.
- Increasing use of Net Promoter Score® (NPS®) to measure the intention to recommend/refer a travel destination, organization or sector. Destination BC has identified NPS drivers as a common provincial goal. For further information on NPS, see Appendix 7.5.
- Empowering the Visitor Services Network to increase the impact, reach and accessibility of innovative visitor services in communities to ensure remarkable experiences for visitors at every touch point.
- Assisting tourism businesses to evolve their offerings and meet and exceed guest needs and expectations through the development of remarkable experiences.
- Enabling tourism businesses to elevate their abilities by offering enhanced professional development and learning resources.
- A strong focus on destination development throughout the province through collaborative, integrated planning and coordination and that leads to enhanced tourism economic growth.

2.9.1 Key Markets

Destination BC's investment strategy focuses on three investment classifications to determine where marketing activity and funding will be best focused.

Invest for Growth - Destination BC will invest in these high-potential markets to inspire new and repeat travel to BC and increase market share. Markets: British Columbia, Alberta, US (Washington, California) and China.

Maintain to Strengthen - Destination BC will maintain investment in these traditional markets to ensure BC continues to be a travel destination of choice. Markets: Ontario, UK, Germany, Australia and Japan.

Respond and Monitor - Destination BC will support Destination Canada in these markets and watch for changes that indicate new market strategies and investments that are warranted. Markets: South Korea, Mexico, India and France.

Markets included in 'invest for growth' and 'maintain to strengthen' are considered Destination BC's top ten key markets (BC, Alberta, Washington, California, China, Ontario, UK, Germany, Australia and Japan). All of Destination BC's marketing activities – Consumer Marketing, Travel Trade, Travel Media, Co-op Marketing – are all designed to drive growth from these markets.

While investment is not currently present for markets included in 'respond and monitor' (South Korea, Mexico, India and France), they continue to be important markets for BC. Through partnership with Destination Canada, Destination BC will continue to work with travel media to increase awareness and travel trade to increase product in the market.

Demographics also are reviewed by market. Although the Millennial cohort (ages 18-35) may be the same size as global Baby Boomers (52-70), they do not have the same wealth. In addition, Baby Boomers tend to be retired, or close to retired, and have the time to travel. In activities where age is relevant, Destination BC will focus primarily on Baby Boomers in the US and Europe (except for ski), and will focus on Millennials/GenX in China, Japan and Mexico. (Figure 15)

Figure 11: Leisure Visitors to BC by Market

	BC	AB	ON	WA	CA	CH	AUS	GER	UK	JP
Millennials (Ages 18-35)**	34%	36%	35%	16%	15%	31%	30%	32%	16%	**40%**
Generation X (Ages 36-51)**	**40%**	**39%**	**38%**	31%	32%	**52%**	23%	**39%**	34%	19%
Baby Boomers (Ages 52-70)**	26%	26%	27%	**39%**	**43%**	13%	**44%**	22%	**43%**	39%
Other Generations	N/A	N/A	N/A	14%	10%	4%	2%	7%	7%	2%

**Approximate current age range for each generation, based on media sources.
Source: Destination BC Global Marketing Plan, 2017.

2.9.2 Traveller Type

Destination BC primarily markets to leisure travellers (65%). Along with the consumer insights gained through branding consumer research, Destination Canada's Explorer Quotient (EQ) psychographic segmentation model allows us to more deeply understand and inspire the motivations, dreams and passions of our target consumers. Destination BC activity targets three of the twelve North American EQ segmentation types - Authentic Experiencers, Cultural Explorers and Free Spirits.

AUTHENTIC EXPERIENCERS
(PRIMARY)
Older and highly educated, they relish experiencing all their travel destination has to offer in an authentic, reserved, non-exorbitant way. They like the freedom of doing their own thing and connecting with the locals, and have a particular interest in history.

CULTURAL EXPLORERS
(PRIMARY)
Avid, open-minded and socially engaged travellers, they embrace, discover and immerse themselves in all aspects of the travel experience. They seek spontaneous and authentic experiences on their own terms.

FREE SPIRITS
(SECONDARY)
Younger, adventurous thrill seekers, they are highly social and open-minded. They are committed travellers who indulge in high-end experiences that are shared with others.

Although activities overlap by EQ type, travellers in each EQ type also have unique interests – for example Cultural Explorers want to be immersed in the culture of a destination (e.g., sampling the local cuisine is one way to achieve an understanding of the people and the area of the destination), while Free Spirits are keen on bucket lists and brand names (e.g., shopping being one outlet for acquiring brand name possessions).

Destination BC conducted research on its North American (BC, AB, WA, CA, ON) consumers that included travellers who intend to travel to BC in the next two years. As part of the research, consumers were asked what activities they intended to participate in while in the province. General sightseeing, nature/scenery and relaxing are common top five activities across all of the four the EQ types, however, they may wish to participate in the activities differently (e.g. nature/scenery – guided group tour versus a local guide).

Top Five Activities EQ Types Anticipates Participating while in BC

	Authentic Experiences *(n = 503)*		Cultural Explorers *(n = 263)*	
Top 1	General sightseeing	70%	Nature, scenery	75%
Top 2	Nature, scenery	66%	Relaxing	71%
Top 3	Touring/driving trip	63%	General sightseeing	67%
Top 4	Relaxing	59%	Touring/driving trip	61%
Top 5	Walking	57%	Sampling local cuisine	60%
	Free Spirits ***(n = 395)***		**Gentle Explorers+** ***(n = 810)***	
Top 1	Relaxing	72%	Relaxing	57%
Top 2	General sightseeing	66%	General sightseeing	56%
Top 3	Nature, scenery	57%	Touring/driving trip	49%
Top 4	City/Town sightseeing	55%	Nature, scenery	45%
Top 5	Shopping	52%	City/Town sightseeing	43%

Destination BC's Brand Discovery Research (2013)

+Gentle Explorers: while not one of Destination BC's targeted EQ types, it is the largest segment of travellers within BC.

3 WEST KOOTENAY/REVELSTOKE PLANNING AREA MANAGEMENT CONTEXT

3.1 Management Structure & Key Initiatives

The tourism industry in B.C. is comprised of many different organizations with various stakeholders including tourism businesses, suppliers, product sectors, communities, associations, regional destination marketing organizations, First Nations and federal, provincial, and municipal governments, all playing a role in destination management. The following organizations are significant in destination development (examples):

Federal	Provincial	Regional	Local
• Destination Canada • Western Economic Diversification • Parks Canada • Department of Ocean and Fisheries	• Destination BC (DBC) • Ministries: • Jobs, Tourism and Skills Training • Transportation and Infrastructure • Forests, Lands and Natural Resource Operations, incl. Rec Sites and Trails • BC Parks • Community, Sport and Cultural Development	• K'tunaxa First Nation • RDCK/RDKB/CSRD • Kootenay Rockies Tourism • Community Futures • Imagine Kootenay • Invest Kootenay • Work West Kootenay/ Regional Workforce Development Initiative • West Kootenay Airport Committee • Columbia Basin Trust • Columbia Kootenay Cultural Alliance • Southern Interior Beetle Action Coalition • Selkirk College • West Koot Route Group • Lower Columbia Initiatives Corporation • Lower Columbia Tourism	• Local Governments • Community DMO's • Chambers of Commerce • Visitor Centres • Tourism Operators • Arts, Culture, Heritage Organizations • Clubs/Volunteer Groups (e.g. Trails, Nordic, Snowmobile) • Residents

In addition to the above, there are multiple local organizations that play a role in destination development, including:

- Trails organizations – Kootenay Columbia Trails Society, Revelstoke Trail Alliance, Nelson Area Trail Society, Nakusp and Area Community Trails Society, North Slocan Trails Society, New Denver – Silverton Trails Society, Castlegar Parks and Trails Society, Columbia and Western Trail Society, Slocan Valley Heritage Trail Society, Kaslo Trailblazers Society, Trails for Creston Valley Society, East Shore Trails and Bike Association
- Nordic Trail organizations – Black Jack Nordic Ski Club (Rossland), Revelstoke Nordic Ski Club, Nakusp and Area Community Trails Society, Nelson Nordic Ski Club, Hills Nordic Ski Club (Slocan Valley), Castlegar Nordic Ski Club, Beaver Valley Cross Country Ski Club,
- Cycling organizations, such as Revelstoke Cycling Association, Nelson Cycling Club, Creston Valley Cycling Club, Kaslo Mountain Biking Club, Nakusp and Area Bike Society, Silverton Cycling Club, Castlegar Mountain Bike Society, Kootenay Columbia Trails Society

- Snowmobile organizations – Revelstoke Snowmobile Club, Slocan Valley Snowmobile Association, Castlegar Snowmobile Association, Nelson Sno-Goers, Beaver Valley Snowmobile Club
- Backcountry/Mountaineering – Kootenay Mountaineering Club, the Association of West Kootenay Rock Climbers
- Arts organizations – Revelstoke Arts Council, Revelstoke Visual Arts Society, Arrow Lakes District Arts Council Society, Valhalla Fine Arts Society, Slocan Lake Gallery Society, Slocan Lake Arts Council, Slocan Valley Cultural Alliance, Slocan Valley Threads Guild, Valhalla School of Theatre Arts, Slocan Electronic Arts Centre, Langham Cultural Society (Kaslo, North Kootenay Lake Arts and Heritage Council, West Kootenay Regional Arts Council, Community Arts Council of Creston, Artisans of Crawford Bay, Nelson and District Arts Council, The Civic Theatre Society (Nelson), Castlegar Arts Council, Selkirk Weavers and Spinners Guild, Trail and District Arts Council/Charles Bailey Theatre, Rossland Council for Arts and Culture;
- Music organizations, such as Kaslo Jazz Society, Shambhala Music Festival, West Kootenay Bluegrass, Creston Concert Society, Valley Bluegrass Music Society (Castlegar),
- Heritage Organizations, such as Trail Historical Society, Nakusp Museum, Sandon Historical Society and Sandon Museum, Silvery Slocan Historical Society, Kootenay Lake Historical Society, Nelson Museum, Castlegar and District Heritage Society, Rossland Historical Museum and Archives Association, Creston Museum, Revelstoke Museum and Archives;
- Agricultural/Farmers Market organizations – Kootenay Local Agricultural Society, Rossland Mountain Market Society, Revelstoke Farm & Craft Market, Creston Valley Farmers Market, Cottonwood Community Market (Nelson),
- Business development organizations, such as Chambers of Commerce in each community, Community Futures, Rural Development Institute, Fields Forward (Creston), Slocan Valley Economic Development Commission, Kaslo Food Security Project, Creston Valley Food Action Coalition
- Nelson Road Kings Car Club, Kootenay Lake Vintage Car Club,
- Environmental/stewardship organizations, such as Slocan Lake Stewardship Society Conservation, West Kootenay EcoSociety, Friends of Kootenay Lake Stewards, Rossland Society for Environmental Action

The following charts outline the main Federal, Provincial, First Nation, Regional and Local initiatives that are relevant to tourism development and specific to the West Kootenay/Revelstoke planning area.

Federal	
Description/Mandate	**Key Initiatives**
Government of Canada More than 15 Government of Canada departments and agencies work together to support Canada's tourism industry.	• Promotional investment in the US Market. • Improving border access to Canada. Improving VISA services, e.g., reinstating VISA with Mexico. • Improving National Parks. • Financial support to tourism businesses, communities in partnership with other levels of government and with Aboriginal communities. • Investing in tourism and cultural infrastructure, e.g., the Building Canada

	Plan and Canada's Economic Action Plan both invest in infrastructure that benefits tourism, such as convention centres, exhibition halls, arts centres, and sports, recreational, cultural and heritage assets. • Supporting the development of aboriginal cultural tourism experiences, in particular near national parks. • Support and tools for cultural and heritage tourism. • Budget 2016 proposed duty savings to allow ferry operators "to reinvest the savings in their fleet renewal plans, enhance ferry services and reduce fares for passengers and commercial users".
Destination Canada is a federal Crown Corporation that is Canada's national tourism marketing organization. $90 million (Total Budget)	• Manage the Canada Brand. • Strategic marketing in 11 International markets: Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea, the UK and the US. • Market research and analysis. • EQ Program management. • Promotes product and industry development. • Increase focus and investment in the US Market. • Focus on big data to improve marketing effectiveness. • Focus on partnerships to extend marketing reach. • Assist small – medium sized businesses in being ready and able to promote their products and travel experiences to the international markets. A focus on supporting entrepreneurship. • Focus on youth travel. • Developing marketing platforms for partners to help close the sale. • Measurements, research and insight.
Western Economic Diversification (WD) $137 million (2015/16 Total Budget)	• WD invests in a wide range of programs and projects that focuses on the economic development of Western Canada. • Initiatives: The Canada 150 Community Infrastructure Program supports community infrastructure including cultural centres and museums, parks and recreational trails and tourism facilities; Western Diversification Program is the main program through which WD invests in projects related to innovation, business development and entrepreneurship, community economic development and policy, advocacy and coordination. • Financial support for AtBC and aboriginal tourism development.
Parks Canada $1,157.7 million (2015/16 Total Budget)	• Protect and present nationally significant examples of Canada's natural and cultural heritage. Initiatives: Infrastructure Investment, Indigenous Affairs, Environmental Stewardship.
Department of Fisheries and Ocean $2,140.5 million (2015/16 Total Budget)	• Manages Canada's fisheries, its oceans and freshwater resources, and safeguarding its waters. • Responsible for opening and closing beaches, ensuring licensing and setting harvesting levels. • Designates specific areas of the ocean as Marine Protected Areas to protect ecologically and biologically important resources. • Recent commitment to address the issue of abandoned and derelict

	vessels, in collaboration with provincial, territorial, municipal and Indigenous organizations.

Provincial	
Description/Mandate	**Key Initiatives**
Destination BC (DBC) $52.6 million (2015/16 Total Budget)	• Include West Kootenay/Revelstoke planning area in marketing BC domestically, nationally and internationally as a tourist destination via consumer advertising and campaigns, travel trade, media relations, content generation and social media efforts. • Cooperative marketing programs working with West Kootenay/Revelstoke planning area tourism and sector marketing organizations, including BC Ale Trail, Mountain Biking BC, and BC Camping and RV Coalition. • Market research and analysis – including support for regional and West Kootenay/Revelstoke planning area research, e.g., Rossland Mountain Bike Visitor Study, 2011. • Destination Development Planning – West Kootenay/Revelstoke planning area Planning Area. • Provides core funding to Aboriginal Tourism Association of BC, which undertakes tourism development and marketing for Aboriginal-owned tourism businesses • Visitor Services Network – service funding and Innovation Fund.
Ministry of Jobs, Tourism and Skills Training (MJTST) $195.4 million (2015/16 Total)	• Initiatives: Tourism policy direction and coordination between government and Destination BC, Resort Municipality Initiative, Aboriginal business and investments, Industry Training Authority, Creative BC. • WorkBC - helps people find jobs, explore career options and improve their skills. Also help employers fill jobs and grow their businesses. • Community support for economic development • MRDT program – up to 3% tax to sale of short-term accommodation to provide funding for local tourism marketing, programs and projects. • Resort Municipality Initiative – funding provided to eligible resort-based communities (Revelstoke and Rossland) • Tourism Events Program – a funding program to support major cultural or sports events that attract travelers to BC communities • Creative Sector - provide expertise and business support to strengthen BC's motion picture, interactive digital, music and publishing sectors. • Tourism Policies - work across government to identify and mitigate policy barriers across government.
Ministry of Aboriginal Relations & Reconciliation	• Work on agreements that support First Nation self-governing and broader economic development, including: • K'tunaxa Kinbasket Treaty Council Negotiations • First People's Cultural Council • First Nation Leadership Gathering, 2016 – all First Nations commitment to participate in the Destination BC Destination Development Planning process.

Ministry of Transportation and Infrastructure (MOTI)
 	
$843.4 million (2015/16 Total budget)
	• West Kootenay/Revelstoke planning area is part of the Southern Interior Region (Rocky Mountain District (Revelstoke) + West Kootenay District)
	• Year 1 Report Card – BC on the Move identifies relevant projects for the planning area as of June 2016:
	• Highway #1 Kamloops to AB border – 2 projects completed; 2 under construction; 8 in planning/engineering
	• Highway #3 – Crowsnest – 1 project completed; 2 under construction (Hope/Princeton area and Cranbrook to Alberta border)
	• Contract being developed for 4 new inland ferries to service communities along the Kootenay River, Arrow Lakes
	Bike BC funded projects:
	• Castlegar – 17th Street Connors Road multi-use separate path $100,000
	• Central Kootenay Regional District – Great Northern Rail Trail $70,375
	• Revelstoke – Cycling and Pedestrian Bridge $50,000
	• Rossland – Trail Creek Trail $25,000; Okanagan Landing Bike Lanes $24,415; Upper Columbia Multi Use Trails $25,000; Pinewood Connectors $24,537
	• Trail Pipe/Pedestrian Bridge $800,000
	BC Air Access Program - $1.18 million to fund Trail Regional Airport infrastructure improvements including new terminal building;
	• Significant investment in resurfacing major numbered roads over the last ten years
	• Top 5 things in next 10 years – reliability/stability focus:
	  o Improving side road system for rural residents
	  o Bridge program – wood bridges need to be replaced throughout Kootenays – end of lifespan
	  o Shoulder widening on areas of highways where there are shoulder failures
	  o Community safety improvements – review collision data (crosswalks, overhead lighting, intersections, turning lanes etc.)
	  o Old overhead messaging signs (Open/Closed) – improve and update to permit messaging

Ministry of Forests, Lands and Natural Resource Operations, including Rec Sites and Trails (RST) $608.1 million (2015/16 Total Budget)	• FrontCounter BC - single window service for clients of provincial natural resource ministries and agencies. Located in Revelstoke, Castlegar and online. • Cumulative Effects Framework – assessing and managing the measure the effect of all natural resource activities on values that are important to the people of British Columbia. • BC Rural Dividend Fund - The $75 million fund will assist rural communities and organizations diversify their economies and build and retain their workforce. First Nations are eligible for funding. Awards from the first intake included Castlegar and District Community Services Society ($100,000); Village of Kaslo ($69,118); Village of New Denver ($21,608); City of Revelstoke ($100,000); City of Trail ($79,759) • Heritage BC Grants and Programs – 2016 projects included Kootenay Lake Historical Society SS Moyie interpretive signage; Rossland Heritage

	Commission Calvary Cemetary Signage; in 2014 Rossland also received funding for the Miners Hall Preservation and Restoration; • Approx. 30 Forest Stewardship Plans are all in the process of renewal. Public consultation and considerations for recreation and other use required. • Cumulative Effects Framework – assessing and managing the measure the effect of all natural resource activities on values that are important to the people of British Columbia. • Recreation Sites and Trails Initiatives and Responsibilities – Mountain Biking, Provincial Trails Strategy, restoration of old fire lookout towers, camping at recreation sites, authorizing, managing and marketing of public recreation trails on Crown land outside of parks and settled areas, partnering with local recreation clubs or local government organizations to manage and market trails, etc. • Stewardship of Provincial Crown land and natural resources, and protection of BC's archaeological and heritage resources. Initiatives: BC Wildfire Services, Crown Land Policies, Heritage, and Fish, Wildlife & Habitat Management, Resort. • Recreation Sites and Trails Initiatives (Southern Interior East District) – many investments are being made by RST in the planning area including trail planning (Creston/East Shore), mountain biking trails (Castlegar), Slocan Valley Rail Trail, hot springs improvements north of Nakusp • Under the BC Parks Future Strategy announced last November, the Province will invest $22.9 million over 5 years to increase the number of available campsites, including an additional 1,000 spots in FLNRO Rec Sites.
Ministry of Environment, including BC Parks $138.9 million (2015/16) BC Parks budget $30M (2016/17 Budget Estimate)	• BC Parks manages a system of 1,032 protected lands, covering approximately 14.4 percent of the province or approximately 14 million hectares, making BC Parks the 3rd largest parks system in North America. • BC Parks operates over $750 million (est.) worth of facilities across the province – including over 10,700 vehicle accessible campsites & approximately 2000 walk in/ backcountry campsites making BC Parks the largest single most accommodation provider in the Province. • BC Parks offers a variety of experiences and infrastructure to support domestic and international tourism including reservable individual and group campgrounds and picnic areas, 3 reservable destination wilderness experiences (Garibaldi, Berg Lake Trail and the Bowron Lake Canoe Circuit) 126 boat launch areas; and, approx. 6000 kilometres of hiking trails. • In 2016 BC Parks' reservation system (Discover Camping) processed over 185,000 reservations, a 17% increase from previous years (an accumulated increase of 91% over the last 5 years). Approximately 75% of reservations originated from B.C. • The parks and protected areas system is the single largest recreation operation in the province; in 2015/16, camping, day use and boating fees

	(recreation user fees) generated approximately $22.6M in revenue.
	• BC Parks markets its recreation opportunities both through its own marketing program – with tools such as the BC Parks website (over 3+million visits per year); Facebook (February 2017, 20,000 people like the page); and Instagram (launched May 2016, now has over 20,000 followers) in concert with key partners, including Destination BC.
	• On November 28, 2016 Premier Christy Clark announced the **"BC Parks Futures" Strategy** which includes an investment of $35 million over the next three years will:
	  o fund more full-time park rangers;
	  o create new programs to promote recreation, partnerships and protect the natural environment; and,
	  o Provide an initial endowment for a new BC Parks Foundation.
	• Programs arising from increased operations funding include:
	  o Discover BC Parks program engaging the public through interactive mobile learning spaces, mobile apps, online activities and projects for children, and volunteer-led outreach.
	• Promote First Nations culture and to honour the importance of their ancestral lands.
	• In 2016 B.C. Parks (in partnership with Recreation Sites and Trails B.C.), announced its new strategy with $23 million for campsite expansion and an additional $15 million to maintain and/or refurbish existing campsites and backcountry recreation sites throughout BC.[58]
	• Working with Park Operators to enhance visitor services, e.g., RV rentals, activities.
	• Increasing accessible design standards for facilities in newly built and existing campgrounds and day use areas in BC Parks. *
	• Capital investments in existing BC Parks, including:.
	• BC Parks Future Strategy investment $22.9 million over 5 years to increase the number of available campsites, including an additional 800 spots in BC Parks, with an emphasis on higher-demand areas in the south of the ProvinceWorking with PFOs to enhance visitor services, e.g., RV rentals, activities.
	• Have been monitoring the displacement of wildlife from the use and construction of trails.
	• Process applications and activities for filming inside BC Parks

Ministry of Community, Sport and Cultural Development (MCSCD) $228.5 million (2015/16 Total Budget)	• In February 2016, the Ministry announced a three-year Creative Economy Strategy. As part of the strategy, the Province will be targeting $1.5 million over the next three years towards shared creative spaces, including: - Invest in hosting major festivals and events. - Collaborative Spaces intake – grants up to $50k for collaborative projects. - Showing artists/galleries in International markets. - Business development work for artists/arts organizations under

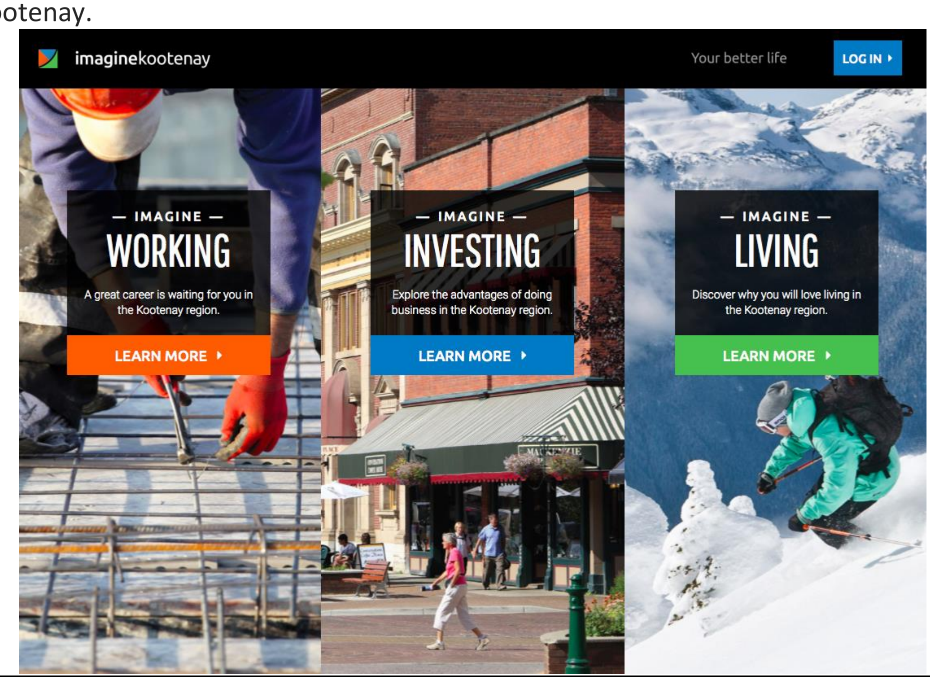
	development. - Artsvest training and incentive program designed to spark new business sponsorship of arts and culture. West Kootenay/Revelstoke planning area is not currently engaged in this program. • Develop a five-year Sports, Arts and Culture Hosting Program, designed to attract marquee events, and maintain the province's reputation as a premier sports and cultural event destination. (Working with MJTST.) • Climate Action Charter – all municipalities and regional districts on the West Kootenay/Revelstoke planning area have signed the charter. • Community Recreation Program: West Kootenay/Revelstoke planning area grants include: Castlegar Outdoor Natural Swimming Pool $400,000; Creston Recreation and Trails Equipment $400,000; Kaslo's Sustainable Complex Project $188,666; Nakusp Kuskanax Creek Footbridge Replacement $340,000; Nelson Outdoor Skatepark $400,000; New Building Canada Fund - Small Communities Fund • Central Kootenay Regional District Arrow Mainline and Erickson Open Reservoir Replacement – Phase 4 (Drinking Water) $2.9 million • Village of Nakusp Pressure Reducing Station and Supply Mains for Sleepy Hollow (Drinking Water) $173,332 • City of Revelstoke Big Eddy Water System (Drinking Water) $3.8 million • City of Rossland Washington Water Main Replacement (Drinking Water) $2.2 million BC Arts Council funding – accessed by many organizations in the planning area Gaming Grants: Local organizations up to $100,000 per year; Regional organizations up to $225,000 per year; Province-wide organizations up to $250,000 per year
Ministry of Agriculture	• Regional District of Central Kootenay completed an Agricultural plan in 2011; Creston Valley was completed in 2002; Boundary Area Agricultural Plan completed in 2012. • Regulatory changes to allow farmers to hold special agri-tourism events, e.g., weddings and music festivals on their property without a permit, providing specific conditions are met, such as a maximum of 150 guests at each event, a restriction of 10 events or less annually, no permanent parking, and no new permanent structures built on the land. • Buy Local program. • Create new markets for BC wine, craft beer and spirits. • Strengthen certification and quality assurance programs. • Looking for support in demonstration economic value of agri-tourism.
Heritage BC	• Manage the Heritage Legacy Fund, and administer grants. • Manages the Chinese Canadian, Japanese Canadian Recognition program, identifying areas of significant cultural value.
Aboriginal Tourism Association of BC (AtBC)	• Works closely with tourism, business, education and government organizations to help British Columbia's Aboriginal tourism businesses offer quality experiences and actively promotes these experiences to visitors and local residents. • Initiatives: marketing and promotion, training and business development, Aboriginal travel services (travel agency), regional strategies, Klahowya Village (Vancouver/Victoria), "Authentic Indigneous" cultural authenticity

	program. • Training programs - 12 workshops - training and capacity building program to develop tourism businesses, improve market readiness and assists with job/careers. • Actively promoting stakeholders through marketing efforts such as social media, blogs, sharing culture/stories; in West Kootenay/Revelstoke no stakeholders listed on www.aboriginalbc.com
Sector Marketing Organizations	• Multiple sector marketing organizations support operators and communities on the West Kootenay/Revelstoke planning area, including: - Mountain Bike Tourism Association: launching new tourism development services for communities; research; contribute to Mountain Bike Tourism Manual; and marketing efforts. www.mountainbikingbc.com - BC Camping and RVing Coalition: marketing efforts. www.campingrvbc.com - Backcountry Lodges of BC: marketing efforts www.backcountrylodgesofbc.com - BC Fishing Resorts & Outfitters Association (BCFROA): marketing efforts www.wheretofishinbc.com
go2HR	• Supporting the tourism industry in attracting, training and retaining a reliable and skilled workforce. • WorldHost Training Services - delivers world-class customer service workshops, e-Learning and customized courses for the tourism and hospitality industries. (go2Hr will be program owner effective 2017.) • HR counsel to the West Kootenay/Revelstoke planning area Destination Development Planning process. • Partnership with Kootenay Rockies Tourism to address region-specific labour challenges
Tourism Industry Association of BC	• Advocacy on provincial tourism issues (e.g. Crown land access, sector development etc.) • Lobbying and creating awareness about specific provincial tourism issues • Providing tourism related information and research services.

Regional	
Description/Mandate	**Key Initiatives**
Columbia Basin Trust (CBT) ***"$31 million in programs and services delivered to the basin last year"…July 27, 2016 News Release*** ***"20 projects receive $1 million under Recreation Infrastructure Grants"….September 2,***	The Trust was created in 1995 to support efforts by the people of the Basin to create a legacy of social, economic and environmental well-being in the Canadian portion of the Columbia River Basin—the region most affected by the Columbia River Treaty (CRT). According to www.ourtrust.org during the creation of the CRT, Basin residents weren't adequately consulted for their views, concerns or solutions. In the early 1990s, residents, local officials and representatives from regional districts and tribal councils joined together to coordinate efforts, forming the Columbia River Treaty Committee. Reflecting the desires of the people of the Basin, the committee approached the Province of BC and successfully negotiated: 1. That funds be allocated to the region, representing a fair share of the

2016 News Release ***"Over 160 arts, culture and heritage projects have received a total of $706,000 in funding support for 2016-17 season….***	ongoing benefits being realized outside of the Basin as a result of the CRT 2. That a regional organization, governed by a board of Basin residents, be created to manage those funds. A binding agreement was established resulting in the Province providing: • $276 million to finance power project construction • $45 million, which the Trust used as an endowment • $2 million per year from 1995 to 2010 for operations. Currently CBT has 13 Strategic Priorities: • Affordable Housing • Agriculture • **Arts, Culture and Heritage** • Broadband • Community Priorities • Early Childhood and Childhood Development • **Economic Development** • Environment • First Nations Relationships • Land Acquisition • Non-Profit Support • **Recreation and Physical Activity** • Renewable and Alternative Energy Many projects throughout the planning area have been funded through CBT.
Southern Interior Development Initaitive Trust (SIDIT)	• On February 27, 2006 the government of British Columbia enacted legislation launching the Southern Interior Development Initiative Trust with a $50 million one-time allocation paid into a Regional Account. The objective of the Southern Interior Development Initiative Trust is to help grow and diversify the economy of the Southern Interior of British Columbia through economic development initiatives that meet the following strategic priorities: 1. Contribution towards economic sustainability of small communities 2. Regional impact 3. Realistic measurement criteria established to assess project outputs 4. Job creation, job preservation, or enhancement 5. Economic diversification 6. Leveraging other funds (It is expected that projects supported by SIDIT will have a minimum of matching funds invested by either the project proponent or other parties) 7. Filling funding gaps 8. Avoiding overlap and duplication 9. Economic merit 10. Research and Development leading to commercialization 11. Strategic initiatives 12. Ensuring geographic sensitivity in the disbursement of SIDIT funds

	• Projects include: Nelson Civic Theatre \$10,000; City of Nelson Broadband Initiative \$50,000; City of Trail Fibre Broadband Commercialization \$50,000;City of Rossland fibre network \$50,000; Kaslo and Area fibre/broadband initiative \$50,000; BlackJack Cross Country Ski Club (Rossland) \$50,000 in 2010 + \$10,000 for trail improvements; Red Mountain Ski Resort (undisclosed \$); Nakusp Cenntennial Golf Course \$7,300; Red Mountain Academies \$15,000; Revelstoke Nordic Ski Club \$50,000 for trail improvements
Southern Interior Beetle Action Coalition ***"Since inception, SIBAC has supported over 92 community projects and provided over \$1.8million in funding which was leveraged an additional \$14.2 million."*** **www.sibacs.com**	• Represents 9 Regional Districts and 6 Tribal Councils in the Southern Interior • To encourage greater access to rural investment capital SIBAC is currently focusing on three major activities: 1. Encouraging the Provincial Government to create a BC equivalent to the Nova Scotia program; 2. Supporting the creation of the Christina Lake Venture Capital Corporation; and 3. Sponsoring a major project to bring the Unleashing Local Capital Project to BC. • Recent SIBAC funded community projects in the planning area include: • West Koot Route Tourism Business Plan 2015 • Invest Kootenay • Columbia Cultural Tourism Strategy 2014 • Mapping Visitors to the Columbia Valley Final Report. 2013 • Invest Kootenay Strategic Planning. Nov. 2011 • Invest Kootenay Strategic Planning – November 2011 • BC Rural Network – Rural Communities Summit Kaslo June 2014 • Columbia Discovery Centre, Canal Flats Final Report 2014
Imagine Kootenay/ Invest Kootenay	• www.imaginekootenay.com promotes opportunities to live, work and invest in the Kootenays • Imagine Kootenay (IK) is a joint-initiative of local governments, economic development organizations and Chambers of Commerce with the aim of attracting and supporting investment and workforce development throughout the Kootenay and Boundary region. • Imagine Kootenay strives to: 1. Showcase the outstanding work, business and lifestyle opportunities in our communities through a marketing program that raises the profile of the Kootenay region. 2. Provide interested investors up-to-date information about a community's business environment. 3. Improve investor readiness at the community level by providing tools and facilitating planning. 4. Connect people to the variety of employers and opportunities available within the Kootenay region. Current Imagine Kootenay Partners: o City of Nelson and CSRD Areas E & F o City of Revelstoke and CSRD Area B,

	○ Town of Golden and CSRD Area A, ○ City of Castlegar, ○ Kootenay Lake (RDCK Area A), ○ Columbia Valley Region (Invermere, Radium Hot Springs and Canal Flats; RDEK Areas F&G), ○ District of Sparwood, ○ City of Fernie, ○ Cities of Trail, Rossland and Area ○ Boundary Region ○ Village of Nakusp. Imagine Kootenay is managed and administered by Community Futures Central Kootenay. 
Kootenay Association for Science & Technology (KAST)	• (KAST) is a non-profit organization dedicated to the continued growth of science and technology as key economic drivers in the West Kootenay-Boundary region of BC. KAST works with business and communities to support and showcase the opportunity provided by science, technology, entrepreneurship and innovation in the region • KAST offers business development services, including coaching, expertise, training, and development projects to stimulate the growth of applied science and technology entrepreneurship.
Community Futures Development of Central Kootenay	• Assist existing and new small businesses with training, loans, counseling and resources including: • Business advice and coaching (Basin Business Advisors program – one on one as well as workshops) • Small business loans up to $500,000. • Deliver's the Province's 48 week long Self Employment Program that helps participants develop and launch their own businesses.
Community Futures of Greater Trail	• South Kootenay Business Centre – office space resources and in-house mentoring • Small business and micro loans

	• Deliver's the Province's 48 week long Self Employment Program that helps participants develop and launch their own businesses.
Revelstoke Community Futures	• North Basin Business Advisors Program (Nakusp north to Revelstoke); business planning assistance • Small business loans of up to $150,000 • Deliver's the Province's 48 week long Self Employment Program that helps participants develop and launch their own businesses
Kootenay Rockies Tourism Association	• Regional partnership marketing • Industry development (professional development, regional tourism conference, tourism career awareness) • Assistance to Destination Development planning • Travel Trade and Travel Media Relations • Assistance with Destination Development planning • Support to regional collaboration • The Powder Highway
West Koot Route **www.westkootroute.ca**	• Consortium of tourism interests cooperatively marketing the touring route between Revelstoke-Nakusp-New Denver-Slocan Valley-Kaslo-Nelson • Branding complete and highway signage has been installed
Selkirk College **Columbia Basin Rural Development Institute** **www.cbrdi.ca**	• Selkirk College main campus located in Castlegar with campuses in Nelson and Trail; Learning Centres in Kaslo and Nakusp; approx. 2,400 students including ~300 international students; wide range of programs offered including a strong tourism and hospitality program • The Rural Development Institute (RDI), at Selkirk College, is a regional research centre with a mandate to support decision-making by Columbia Basin-Boundary communities through the provision of information, applied research and outreach and extension support. The RDI is funded by Columbia Basin Trust (CBT) through an 8-year partnership agreement which began in 2011. Selkirk College supports the operation of the institute through its infrastructure and specific capabilities, including the Regional Innovation Chair in Rural Economic Development (RIC) who serves as the RDI Lead Researcher. **The RDI supports:** • the collection and use of economic, social, cultural and environmental indicator research; • provides ongoing analysis of related trends and connects indicators to plans and planning processes; • supports the efforts of economic development groups through the provision of relevant and timely research and best practice tools and processes; • engages in applied rural revitalization research in partnership with regional, provincial and national networks; • assists in regional economic diversification through the promotion of innovation and knowledge transfer; • supports informed decision-making through ongoing research based on regional priorities; and • builds capacity through collaborative working partnerships with existing organizations, networks and experts.

College of the Rockies	• Creston has a College of the Rockies campus with several signature programs in health care, trades

First Nations	
Description/Mandate	**Key Initiatives**
K'tunaxa Nation	• Lower Kootenay band has purchased Ainsworth Hotsprings and has plans for additional Aboriginal cultural interpretation and experiences (hiking, boat tours)
Sinixt First Nation	• No current tourism ventures – focus is on recovering status as a First Nation and having associated rights recognized related to their traditional territory that were eliminated when declared extinct

Communities/Local	
Description/Mandate	**Key Initiatives**
City of Revelstoke	• Executes on the Official Community Plan and the Integrated Community Sustainability Plan (2012) • 5-year Resort Development Strategy submitted to Province identifying strategic areas for investment of RMI funding • Recent investments made in affordable housing projects in partnership with Province and Federal government • Resort Municipality Initiative (RMI) funds invested in snowmobile welcome centre, ski race safety equipment to permit hosting of more races and in upgrades to lighting at Grizzly Plaza to enhance summer concert experiences for visitors; washroom capacity downtown also expanded
Tourism Revelstoke (Revelstoke Accommodation Association) **www.seerevelstoke.com**	• Revelstoke DMO – invests MRDT funds; partners with Chamber of Commerce on a variety of destination marketing initiatives
Revelstoke Chamber of Commerce **www.revelstokechamber.com**	• Manages community visitor centre • Partners with Revelstoke Accommodation Association on destination marketing • Annual business excellence awards
Revelstoke Mountain Resort	• Mt. McKenzie has North America's greatest vertical (5,620 ft) on 3,121 acres of ski terrain; Turtle Creek Tube Park and Beginner Area – typical snowfall 9-14 metres per season • Summer activities expanding – mountain biking trails, events; Pipe Mountain Coaster opened in May 2016

Columbia Shuswap Regional District (CSRD - Area B)	• Rural area around Revelstoke – provides services including planning ALR Applications; Emergency Management; Film Commission • Manages 30 community parks within the RD; Parks Plan for Area B is currently underway • Revelstoke Airport is owned and operated by the CSRD
Village of Nakusp	• Executes on the Official Community Plan • Operates the municipal campground, public beach, concession and gazebo • Investments made in Waterfront Walkway + Wrap Around Nakusp Trail + connect to larger Rail Tails network (part of a larger downtown revitalization) • Council supports a vibrant hotsprings that enhances Nakusp's financial situation and is accessible to residents (100% owned and operated by the Village of Nakusp) • Village engages in lobbying support for a fixed transportation link
Nakusp and District Chamber of Commerce www.nakusparrowlakes.com	• Operates Visitor Centre and acts as DMO for area • Part of the West Kootenay Tourism Alliance (West Koot Route)
Nakusp Area Development Board	• Leads local economic development – projects include business directory; business retention and expansion survey.
Village of New Denver	• Executes on the Official Community Plan • Cenntennial Park campground on Slocan Lake operated by the Village • Operates the Nikkei Internment Memorial Centre (a National Historic Site)
Village of Silverton	• Executes on the Official Community Plan (2010) • Owns Silverton Gallery building and Memorial Hall – two historic buildings that can be rented for meetings and events; Memorial Hall recently updated and now features a fully equipped kitchen, lighting system, full sound system, LCD projected, 200" screen, satellite TV and full internet connectivity
Village of Slocan	• Executes on the Official Community Plan • Village of Slocan provides a ball park, community beach, playground and boat launch; recently finished remodeling former elementary school into Slocan Wellness Center
Slocan Valley Economic Development Commission	• Invests community funds allocated from RDCK and CBT – four projects recently funded related to seniors' housing, a community bus, and food security/local food hub
Slocan District Chamber of Commerce	• Operates Slocan District Visitor Centre • Functions as DMO for Slocan Valley

www.slocanlakechamber.com	• Part of the West Kootenay Tourism Alliance (West Koot Route)
Village of Kaslo	• Executes on the Official Community Plan • Operates Kaslo Municipal campground • Kaslo City Hall and SS Moyie are National Historic Sites
Kaslo and Area Chamber of Commerce www.kaslochamber.com	• Committed to supporting and promoting the well-being of the business community; encouraging partnership and collaboration among businesses; providing opportunities for networking, community involvement and professional growth; and advocating for members at the provincial level to ensure that concerns are heard • Part of the West Kootenay Tourism Alliance (West Koot Route)
Ainsworth Hot Springs	• Recently acquired by the K'tunaxa Nation (Lower Kootenay Band)
City of Nelson	• Executes on the Official Community Plan and Path to 2040 Sustainability Strategy; 2015-2018 Strategic Plan with four strategic goals: Enhance Sustainability of City Services and Infrastructure; Strengthen Neighbourhoods; Expand Local Jobs, Local Prosperity; Achieve Excellence in City Governance • Major projects include: Hall Street Corridor to waterfront; Railtown Sustainable Neighbourhood plan; downtown public realm plan including effective use of landscaping and public art; develop central and east waterfront neighbourhoods including planned amenities; affordable housing identified as need in Housing Strategy • Specific strategy in 2015-2018 to facilitate vibrancy in sport, culture and recreation to enhance economic growth through partnerships, events, festivals and business development • Cultural Collaboration and Recreation Master Plan • Recently renovated and expanded aquatic and fitness centre; multi-use arena and Civic Arena
Nelson Kootenay Lake Tourism Society	• DMO for Nelson, Kootenay Lake, Kaslo including Balfour, Crawford Bay (East Shore of Kootenay Lake)
Whitewater Ski Resort www.skiwhitewater.com	• 1,184 acres of ski terrain; 2,044 foot vertical drop; 12m annual snowfall
Nelson & District Chamber of Commerce www.discovernelson.com	• The Nelson & District Chamber of Commerce Encourages and Supports... 1. Expanded and diversified small business and tourism sectors 2. Development which recognizes the heritage and environmental values of our Community 3. Artistic, cultural and educational activities in our community 4. The resource sector as an important part of our local economy • Houses and operates the Nelson Visitor Centre

Nelson and Area Economic Development Partnership	• The NAEDP is a partnership between the City of Nelson, Community Futures Central Kootenay, the Nelson & District Chamber of Commerce and RDCK Areas E and F. The partnership's goal is to take a unified approach to community economic development initiatives for the city and region
Town of Creston	• Executes on the Official Community Plan (OCP review underway in 2016) and Cultivating Creston – Integrated Community Sustainability Plan adopted in 2013 (timeframe to 2030) • 2015-2017 Corporate Strategic Plan identifies many strategies – of relevance to destination development – strategy to connect town trails to regional trail network; have also identified need for affordably housing • Permanent market park for Creston Farmers Market in progress
Fields Forward Creston **www.crestonvalleyfoodhub.ca**	• Community juicer being purchased as a social enterprise
City of Castlegar	• Executes on the Official Community Plan • Millennium Park investment in natural swimming ponds (opened in 2014) • Supports Castlegar Sculpture Walk
City of Trail	• Executes on the Official Community Plan • Significant projects include downtown revitalization; pedestrian/pipeline bridge across river; Trail Riverfront Centre (Museum & Library) • operates the Trail Memorial Centre, the Trail Aquatic and Leisure Centre, the Willi Krause Fieldhouse, and approximately 20 developed parks within the City of Trail.
Trail & District Chamber of Commerce	• Operates the Visitor Centre • Business Excellence Awards • Works with Lower Columbia tourism collaborative
City of Rossland	• Executes on the Official Community Plan and 5-year Resort Development Strategy as a Resort Community receiving RMI funding • Significant projects include Miners Hall upgrades; working with the Rossland Council for Arts & Culture (RCAC) to restore and renovate the Rossland Miners Union Hall for use by all community members. The City of Rossland is the lead on the Exterior Renovation which includes restoration and preservation work on the roof and siding and includes replacing the leaking roof, replacing and painting damaged siding, removing the crumbling brick chimney and restoring heritage features of the façade. The Rossland Arts Council is the lead on the Interior Renovation which focuses on the renovation of the currently undeveloped Attic (4th Floor) into gathering places for the community, improvements to the Performance Hall and a heritage restoration of the exterior balcony.

	• As of June 21, 2016, RCAC has raised $406,788 of the $513,000 needed for the Interior (4th Floor Attic) Renovation. • Rossland Museum & Discovery Centre/Visitor Centre upgrades - $3 million phased renewal project • **Phase I**: Renovation of the Entry Gallery (entrance gallery space, archives, offices, washrooms, and more) – $480,000 • **Phase II**: Mine Experience (replacement of Black Bear Mine tour) – $700,000 • **Phase III**: Atrium (addition to main building) – $450,000 • **Phase IV**: Industrial Shed (new building on property to house major equipment for display) – $500,000 • **Phase V**: Sign / Sitework / Exterior (exterior work of main building) – $375,000 • **Phase VI**: Interior Renovations (interior exhibitions and mechanical/electrical in main building) – $450,000
Red Resort Association	• Legislated mountain resort association on lands at the base of Red Mountain collects annual membership fees and contributes to Tourism Rossland for destination promotion
Tourism Rossland	• DMO for Rossland; also project manages RMI funding on behalf of the City of Rossland and is lead on Lower Columbia tourism initiatives
Red Resort www.redresort.com	• 4,200 acres of ski terrain; 2,919 feet of vertical and 7.6m annual snowfall
Village of Warfield	• Executes on the Official Community Plan – developing an Integrated Community Sustainabilty Plan (2040) between summer 2016 and summer 2017 • Operates Community Hall and Village Square Park
Village of Montrose	• Executes on the Official Community Plan and recently adopted the Integrated Community Sustainabilty Plan ; Strategic Plan for 2015-2018
Village of Fruitvale	• Executes on the Official Community Plan • Champion Lakes municipal golf club
Village of Salmo	• Executes of Official Community Plan (currently being updated with adoption of new OCP anticipated in 2017) • Strategic Plan 2015-2019
Regional District of Central Kootenay	• Operates 22 regional parks including Great Northern Trail (RDCK has a license of occupation from the Province for this trail) • Operates the Creston Visitor Centre
Regional District of Kootenay Boundary (Areas A & B)	• Strategic plan from 2012-2015 • Manage CBT community initiatives funds for RD – funded projects in 2016/17 relevant to destination development include: Beaver Valley & The Pend d'Oreille Hisotrical Society; Beaver Valley Golf & Recreation

	Society – irrigation upgrade; Beaver Valley X-Country Ski Club – rebuild ski cabin; Black Jack Cross Country Ski Club – Skier Development Program; Greater Trail Creative Activities Centre Society for the Visual Arts – VISA Gallery & Studio Upgarde; Kootenay Columbia Trails Society – Trail Construction; Rossland Council for Arts & Culture – Sculpture for downtown Rossland; Rossland Fall Fair; Rossland Gold Fever Follies; Rossland Historical Museum Association; Rossland Lions Campground – signage upgrade;

3.2 Past Tourism Planning Initiatives

In total, there are over 40 plans and reports that have been reviewed to identify the past tourism planning initiatives. A recap of the most significant plans and projects has been included here. For a full list of the plans, see Appendix 7.2.

3.2.1 First Nation Articulation, Official Community Plans and Regional District Plans

A review of the articulation from First Nation communities, Office Community Plans, Regional District Plans and Sustainability Plans revealed significant similarities. The following common language was found throughout multiple documents and shows general intent for similar visions of what life in the West Kootenay/Revelstoke planning area aspires to be:

- Recognize, preserve and protect our way of life - celebrate who we are – celebrate diversity
- Strong focus on environmental, social and economic sustainability
- Recognition of need for diversification/economic development
- Respect for the environment and natural assets
- Active living in the outdoors – recreational opportunity
- Foster uniqueness of communities – preserve heritage, culture
- Managed housing – affordability and availability
- Support and encourage diversity of people

3.2.2 Transportation Plans

Stakeholders identified the importance of ongoing transportation planning and improvements to ensure reliable air access, adequate inland ferry service and continued road maintenance. Interviews with MoTI staff and their participation in several workshops confirm their understanding of the importance of transportation planning for a successful tourism industry. BC on the Move and its associated Province-wide priorities are being implemented in the planning area. Specifically the Trail Airport has received funds for improvements and the West Kootenay Regional Airport in Castlegar is the subject of a study to assess opportunities to improve its reliability. Many communities have also benefited from the Bike BC funding program. Regional MoTI staff report that the top 5 investment areas in next 10 years will focus on reliability/stability including:

- Improving side road system for rural residents
- Bridge program – wood bridges need to be replaced throughout Kootenays – end of lifespan
- Shoulder widening on areas of highways where there are shoulder failures

- Community safety improvements – review collision data (crosswalks, overhead lighting, intersections, turning lanes etc.)
- Old overhead messaging signs (Open/Closed) – improve and update to permit messaging

3.2.3 Trails Plans

The amount of effort applied to the development of trail plans and the support for the strategies highlights trails as a significant product for the West Kootenay/Revelstoke planning area with identified potential for increasing tourism visitation. Most communities in the planning area have or are developing trail plans often working together with staff from Recreation/Sites/Trails. Trail plans highlight:

- Continued support for the West Kootenay/Revelstoke area as a world-class destination for trails based activities
- The need for maintenance of existing trails including sustainable funding sources to support volunteer efforts
- The need for legitimization of existing trails.
- Planning, development and management of proposed priority trails.

3.2.4 First Nation Agreements and Land Use Plans

The K'tunaxa Kinbasket Treaty Council is currently negotiating with Canada and British Columbia on behalf of the K'tunaxa Nation's four member bands and have reached Stage 4 negotiations leading to an Agreement in Principle. There are two completed agreements in place: Ktunaxa Nation Incremental Treaty Agreement (Creston) 2014 and the K'tunaxa Nation Incremental Treaty Agreement (Wensley Bench) 2013 both of which transferred lands to the K'tunaxa.

The K'tunaxa have also signed an Impacts Management Benefits Agreement with Teck that is supporting their economic development activities. Their Economic Sector Mission is:

"To cultivate a healthy, self-sufficient K'tunaxa economy. Along with communities, partners and neighbours, achieve sustainable economic growth through equitable access to economic resources and opportunities, while respecting K'tunaxa culture and values."

Goals of the K'tnuaxa Economic Sector align well with tourism development and are as follows:
1. Build the Economic Sector structure and capacity
2. Be the catalyst for a strong, diversified and sustainable Ktunaxa Economy.
3. Enhance the economic development capacity of Ktunaxa Communities
4. Complete Corporate Reorganization for KNC-owned businesses
5. Focus on Ktunaxa Entrepreneur
6. Build Ktunaxa human capital
7. Improve access to lands & resources
8. Improve access to capital
9. Establish autonomous revenue base for Ktunaxa Government
10. Working Together with Communities & Sectors
11. Capacity building Initiatives
12. Support Ktunaxa Treaty Team
13. Engage in relevant research & advocacy Initiative

3.2.5 Education

Selkirk College has identified five strategic pillars in the 2013-2018 Strategic Plan – Beyond Imagination:

1. Increase Enrolments
2. Build on our Strengths and Successes to Develop Innovative Programs and Services (including practicum placement, study exchange and experiential learning)
3. Modernize our Infrastructure for State of the Art Learning Environments
4. Expand our impact on community development and innovation
5. Be the Employer of Choice for our Region

Selkirk has experienced and are continuing to pursue a growing number of international students who themselves are visitors and who often attract visiting family members and friends. College of the Rockies has identified tourism as an area of program strength and future focus in its 2015-2020 Strategic Plan.

3.2.6 Arts, Culture & Heritage

Official Community Plans along with a number of economic development and sector plans articulate the significant arts, culture and heritage assets in the West Kootenay/Revelstoke planning area and the desire to nurture and showcase the artistic and cultural individuals and organizations within the communities. Arts, culture and heritage is recognized as integral to community life and enhancing the livability of the West Kootenay/Revelstoke area, expressing the values of the residents and attracting visitors.

Arts, Culture and Heritage is recognized within these following plans, among others:

- Revelstoke and Area Community Action Development Plan – Arts, Culture, Heritage
- Nelson Cultural Tourism Strategy – identifies collaborative scheduling and collaborative marketing throughout the West Kootenay area as a short term strategies along with several longer term initiatives such as support for emerging arts, heritage & culture businesses and investment in signature events
- City of Castlegar – Arts and Culture – Cultural Scan
- Greater Trail – A Cultural Plan for Arts & Heritage

3.2.7 Agricultural

The Regional District of Central Kootenay completed an Agricultural plan in 2011; Boundary Area Agricultural Plan completed in 2012. These plans along with the recent added flexibility on uses of Agricultural Land Reserve (ALR) are supportive of tourism development. The Creston Valley has the largest polygons of land designated as ALR and is focused on the development of its agricultural economy and associated agri-tourism opportunities. The Creston Fields Forward initiative has engaged with the local community in a forum to begin to focus on priority opportunities in agriculture.

There are many smaller polygons of ALR in the Slocan Valley and in/adjacent to most of the communities in the planning area. The website alc.gov.bc.ca provides an interactive tool to identify lands designated as part of the ALR.

The Columbia Basin Rural Development Institute has undertaken a Regional Food Systems project and identified underutilized lands in the ALR as well as an inventory of regional resources for food systems planning and action. See www.cbrdi.ca/food for more details.

3.2.8 Economic Development

Significant planning has occurred focused on economic development and all of the following plans and organizations recognize the growing importance of tourism as part of a diversified economy:

- Revelstoke and Area Community Development Action Plan, September 2007
- Columbia Basin Rural Development Institute – Research undertaken to explore the health of the tourism sector www.cbrdi.ca
- Lower Columbia Community Development Team Society (LCCDTS) has identified tourism as a priority opportunity for the economy. The Tourism Committee was formed to work collaboratively to develop a multi-community, multifaceted approach to strengthen regional tourism. The functions of the Tourism Committee are:
  - Examine trends, market opportunities and challenges based on existing and potential products, community infrastructure, and resources
  - Create a common strategy and implementation plan to promote tourism
  - Identify and promote existing facilities and attractions
  - Identify tourism weaknesses, such as missing products, and explore ways to attract new offerings
  - Liaise with tourism operators and stakeholders
  - Secure funding for identified projects and programs
  - Collaborate with area stakeholders to develop a commitment to a mutually beneficial tourism approach

3.2.9 Destination Marketing

Destination marketing is led by a number of community DMO's including:

- Tourism Revelstoke/Revelstoke Accommodation Association/Revelstoke Chamber of Commerce
- Nelson Kootenay Lake Tourism Association (Nelson, Balfour, Kaslo, Ainsworth Hot Springs and areas in between)
- Destination Castlegar (recently formed and working closely with the Chamber)
- Tourism Rossland (representing Rossland as well as leading on tourism initiatives for the Lower Columbia area communities of Trail, Fruitvale, Montrose, Warfield)
- Town of Creston and RDCK and its tourism stakeholders began working with Kootenay Rockies Tourism in 2016 to update their tourism plan and recently took over the Visitor Centre

In addition to the region-wide efforts of Kootenay Rockies Tourism, a consortium of communities known as the 'West Koot Route' have been working together to promote travel from/to Revelstoke – Nakusp – Slocan Valley – Kaslo – Nelson/Kootenay Lake.

These organizations lead on the execution of typical destination marketing efforts (website, social media engagement, travel trade relations, advertising, consumer shows, media relations etc.) and as the power of the visitor themselves as destination promoter/detractor grows, are beginning to engage more actively in destination development activities.

4 WEST KOOTENAY/REVELSTOKE PERFORMANCE AND MARKET ANALYSIS

4.1 Tourism Performance

There are few indicators available to measure performance of the tourism industry at a local level. The two RMI communities in the planning area report the following impacts:

FINAL DEMAND IMPACTS TOURISM SPENDING									
REVELSTOKE YEAR: 2015	REGION: Columbia-Shuswap Regior 19				REST OF BRITISH COLUMBIA				
	Direct in REVELSTOKE	Indirect	Induced	REGIONAL TOTAL	Direct*	Indirect	Induced	REST OF BC TOTAL	TOTAL IMPACTS, BC
Tourism Revenue/Spending	$121,880,340								
Output	$81,669,157	$3,498,955	$7,553,758	$92,721,869	$12,782,752	$32,894,394	$25,866,989	$71,544,135	$164,266,004
GDP (Value-Added)	$43,153,701	$2,397,330	$4,928,811	$50,479,842	$6,769,487	$18,166,559	$16,875,719	$41,811,766	$92,291,609
Material Inputs	$38,515,456	$1,101,625	$2,624,947	$42,242,027	$6,013,264	$14,727,835	$8,991,269	$29,732,369	$71,974,396
Labour Income	$31,600,109	$1,411,650	$1,180,924	$34,192,683	$4,757,118	$11,442,385	$8,047,805	$24,247,308	$58,439,990
Wages and Salaries	*$27,101,862*	*$1,109,478*	*$957,298*	*$29,168,637*	*$4,155,253*	*$8,954,781*	*$6,523,853*	*$19,633,887*	*$48,802,524*
Mixed Income	*$1,634,114*	*$164,932*	*$104,339*	*$1,903,386*	*$101,370*	*$1,453,574*	*$711,228*	*$2,266,172*	*$4,169,557*
SLI	*$2,864,133*	*$137,240*	*$119,287*	*$3,120,660*	*$500,494*	*$1,034,030*	*$812,724*	*$2,347,249*	*$5,467,908*
Employment	927.3	31.1	25.2	983.6	104.8	228.5	171.7	505.0	1,488.6
Total Taxes	**#########**	**$894,669**	**$874,398**	**#########**	**$1,350,470**	**$2,921,186**	**$4,363,442**	**$8,635,097**	**$33,806,377**
Total Federal Taxes	***$10,431,257***	***$369,968***	***$407,909***	***$11,209,135***	***$757,797***	***$1,388,917***	***$1,825,689***	***$3,972,403***	***$15,181,537***
Total Indirect Taxes	*$5,933,840*	*$24,961*	*$37,001*	*$5,995,802*	*$46,314*	*$64,949*	*$237,782*	*$349,045*	*$6,344,847*
Federal Gasoline tax	*$596,095*	*$9,241*	*$2,775*	*$608,111*	*$0*	*$22,139*	*$17,835*	*$39,974*	*$648,085*
Federal Excise Tax	*$0*	*$155*	*$77*	*$232*	*$68*	*$298*	*$498*	*$864*	*$1,097*
Federal Excise Duties	*$0*	*$480*	*$1,200*	*$1,680*	*$28,796*	*$815*	*$7,713*	*$37,324*	*$39,004*
Federal Air Transportation Tax	*$0*	*$327*	*$225*	*$552*	*$0*	*$582*	*$1,448*	*$2,030*	*$2,583*
GST	*$5,217,598*	*$943*	*$21,394*	*$5,239,935*	*$0*	*$2,598*	*$137,484*	*$140,082*	*$5,380,017*
Indirect Taxes on Production	*$120,147*	*$13,814*	*$11,329*	*$145,290*	*$17,449*	*$38,518*	*$72,803.96*	*$128,771*	*$274,061*
Personal Income Taxes	*$3,023,624*	*$249,814*	*$176,580*	*$3,450,018*	*$514,497*	*$956,290*	*$1,026,783*	*$2,497,570*	*$5,947,588*
Corp. Income Taxes	*$1,473,793*	*$95,193*	*$194,328*	*$1,763,315*	*$196,986*	*$367,678*	*$561,125*	*$1,125,788*	*$2,889,103*
Total Provincial Taxes	***$12,970,955***	***$524,701***	***$466,489***	***$13,962,145***	***$592,673***	***$1,532,269***	***$2,537,753***	***$4,662,695***	***$18,624,840***
Total Indirect Taxes	*$10,893,393*	*$306,888*	*$210,477*	*$11,410,758*	*$276,932*	*$838,653*	*$1,352,592*	*$2,468,177*	*$13,878,935*
Environment Tax	*$40,517*	*$18,387*	*$4,135*	*$63,040*	*$3,562*	*$37,135*	*$26,575*	*$67,272*	*$130,312*
Provincial Trading Profits on Liquor and Lottery	*$105,810*	*$2,295*	*$5,112*	*$113,218*	*$0*	*$3,815*	*$32,854*	*$36,670*	*$149,887*
Provincial Gasoline tax	*$1,847,894*	*$15,875*	*$6,607*	*$1,870,376*	*$0*	*$34,783*	*$42,458*	*$77,241*	*$1,947,617*
PST	*$7,016,869*	*$53,912*	*$17,134*	*$7,087,914*	*$0*	*$159,471*	*$110,108*	*$269,580*	*$7,357,494*
Indirect Taxes on Production	*$1,882,302*	*$216,420*	*$177,488*	*$2,276,211*	*$273,370*	*$603,449*	*$1,140,595*	*$2,017,415*	*$4,293,625*
Personal Income Taxes	*$996,781*	*$147,699*	*$113,504*	*$1,257,984*	*$171,284*	*$424,292*	*$773,670*	*$1,369,246*	*$2,627,229*
Corp. Income Taxes	*$1,080,782*	*$70,114*	*$142,508*	*$1,293,404*	*$144,456*	*$269,324*	*$411,491*	*$825,272*	*$2,118,675*

* Other BC Direct: The producer cost of goods (i.e., the cost excluding wholesale and retail margins, taxes, etc.) is measured at the factory gate and those factories are mostly in other regions. Commodity taxes are assigned to REVELSTOKE

** Output is equal to Spending minus imports minus all indirect taxes.

FINAL DEMAND IMPACTS TOURISM SPENDING									
ROSSLAND YEAR: 2015	REGION: East Kootenay Region # 1				REST OF BRITISH COLUMBIA				
	Direct in ROSSLAND	Indirect	Induced	REGIONAL TOTAL	Direct*	Indirect	Induced	REST OF BC TOTAL	TOTAL IMPACTS, BC
Tourism Revenue/Spending	$12,976,774								
Output	$9,414,612	$373,121	$795,533	$10,583,266	$1,051,460	$3,681,183	$2,897,160	$7,629,803	$18,213,069
GDP (Value-Added)	$5,047,764	$254,337	$519,108	$5,821,210	$566,925	$2,030,284	$1,890,211	$4,487,420	$10,308,630
Material Inputs	$4,366,848	$118,784	$276,425	$4,762,056	$484,535	$1,650,899	$1,006,948	$3,142,383	$7,904,439
Labour Income	$3,664,190	$149,928	$124,647	$3,938,766	$388,647	$1,291,277	$895,015	$2,574,939	$6,513,705
Wages and Salaries	*$3,103,427*	*$117,525*	*$101,043*	*$3,321,995*	*$339,232*	*$1,010,550*	*$725,533*	*$2,075,315*	*$5,397,310*
Mixed Income	*$220,208*	*$17,851*	*$11,013*	*$249,072*	*$8,198*	*$164,036*	*$79,097*	*$251,332*	*$500,404*
SLI	*$340,555*	*$14,552*	*$12,591*	*$367,698*	*$41,217*	*$116,691*	*$90,385*	*$248,293*	*$615,991*
Employment	106.0	3.3	2.7	112.0	8.7	25.8	19.1	53.6	165.6
Total Taxes	**$2,516,464**	**$95,609**	**$94,551**	**$2,706,623**	**$113,530**	**$329,738**	**$485,081**	**$928,349**	**$3,634,973**
Total Federal Taxes	***$1,118,685***	***$38,992***	***$44,021***	***$1,201,699***	***$64,891***	***$157,182***	***$203,648***	***$425,721***	***$1,627,420***
Total Indirect Taxes	*$589,238*	*$2,564*	*$3,910*	*$595,712*	*$6,148*	*$7,227*	*$26,453*	*$39,828*	*$635,540*
Federal Gasoline tax	*$36,778*	*$920*	*$293*	*$37,991*	*$0*	*$2,430*	*$1,984*	*$4,414*	*$42,405*
Federal Excise Tax	*$0*	*$16*	*$8*	*$24*	*$8*	*$34*	*$55*	*$97*	*$121*
Federal Excise Duties	*$0*	*$50*	*$127*	*$176*	*$4,739*	*$90*	*$858*	*$5,687*	*$5,863*
Federal Air Transportation Tax	*$0*	*$34*	*$24*	*$58*	*$0*	*$66*	*$161*	*$227*	*$285*
GST	*$538,276*	*$98*	*$2,260*	*$540,635*	*$0*	*$296*	*$15,294*	*$15,590*	*$556,225*
Indirect Taxes on Production	*$14,185*	*$1,446*	*$1,197*	*$16,828*	*$1,401*	*$4,311*	*$8,099.92*	*$13,812*	*$30,640*
Personal Income Taxes	*$352,659*	*$26,431*	*$18,638*	*$397,728*	*$41,673*	*$109,322*	*$115,190*	*$266,185*	*$663,913*
Corp. Income Taxes	*$176,788*	*$9,997*	*$21,474*	*$208,259*	*$17,070*	*$40,633*	*$62,006*	*$119,708*	*$327,967*
Total Provincial Taxes	***$1,397,779***	***$56,616***	***$50,529***	***$1,504,924***	***$48,639***	***$172,556***	***$281,433***	***$502,629***	***$2,007,553***
Total Indirect Taxes	*$1,151,908*	*$32,273*	*$22,241*	*$1,206,422*	*$22,256*	*$95,197*	*$150,482*	*$267,934*	*$1,474,356*
Environment Tax	*$4,966*	*$1,888*	*$437*	*$7,291*	*$299*	*$4,175*	*$2,956*	*$7,430*	*$14,722*
Provincial Trading Profits on Liquor and Lottery	*$18,560*	*$237*	*$540*	*$19,337*	*$0*	*$424*	*$3,655*	*$4,078*	*$23,415*
Provincial Gasoline tax	*$114,011*	*$1,641*	*$698*	*$116,351*	*$0*	*$3,935*	*$4,723*	*$8,658*	*$125,009*
PST	*$792,142*	*$5,852*	*$1,810*	*$799,805*	*$0*	*$19,123*	*$12,249*	*$31,371*	*$831,176*
Indirect Taxes on Production	*$222,229*	*$22,654*	*$18,756*	*$263,639*	*$21,956*	*$67,540*	*$126,899*	*$216,396*	*$480,034*
Personal Income Taxes	*$116,226*	*$16,674*	*$12,541*	*$145,441*	*$13,866*	*$47,900*	*$85,481*	*$147,246*	*$292,688*
Corp. Income Taxes	*$129,644*	*$7,669*	*$15,747*	*$153,061*	*$12,518*	*$29,459*	*$45,471*	*$87,448*	*$240,509*

* Other BC Direct: The producer cost of goods (i.e., the cost excluding wholesale and retail margins, taxes, etc.) is measured at the factory gate and those factories are mostly in other regions. Commodity taxes are assigned to ROSSLAND
** Output is equal to Spending minus imports minus all indirect taxes.

Over a five-year period, total tourism spending in Revelstoke has experienced steady growth. Total tourism spending in Rossland grew steadily from 2011-2014 with a decline in 2015 likely due to snow conditions and fire events. [23]

Accommodation Seasonality

Room revenues by municipal jurisdiction reported by BC Stats at: http://www.bcstats.gov.bc.ca/Files/c071216f-989d-42ea-9a8c-f68e885274ec/TourismRoomRevenue.xlsx reveal summer and winter peaks in visitation with significant opportunity to utilize capacity in both spring and fall. Stakeholders have identified the fall as offering the greatest potential for growth and a focus for destination development that leads to the desired goal of nine months of steady visitation and revenues.

Month	Revelstoke	Castlegar/Nelson/Rossland
April, 2015	$965,000	$1,235,000
May, 2015	$1,189,000	$1,489,000
June, 2015	$1,845,000	$1,904,000

23 Resort Municipality Initiative Resort Collaborative, RMI Funding Report, September 2016

July, 2015	$3,196,000	$2,673,000
August, 2015	$3,451,000	$2,905,000
September, 2015	$2,452,000	$2,756,000
October, 2015	$1,341,000	$1,645,000
November, 2015	$1,017,000	$1,063,000
December, 2015	$2,717,000	$1,628,000
January, 2016	$2,957,000	$2,020,000
February, 2016	$3,924,000	$2,455,000
March, 2016	$3,212,000	$2,441,000

Inland Ferries

Ministry of Transportation and Infrastructure are responsible for the inland ferry system. Stakeholders report that there are significant delays between Galena Bay and Shelter Bay in peak summer season and there is concern that these delays are impacting travel intentions. There is agreement that the provision of additional services at ferry landings such as free wi-fi would mitigate the inconvenience of waiting. As well there is a desire to support private entrepreneurs interested in operating food/beverage and retail offerings for vehicles in the ferry queue.

Ministry of Transportation and Infrastructure report the following passenger volumes:

	2016	2015	2014	2013	2012
Upper Arrow	338,638	319,770	298,994	296,063	292,892
Needles	318,956	310,455	287,499	288,992	301,721
Kootenay Lake	380,687	375,801	360,371	357,131	368,380

In all cases, 2016 ferry passenger volumes exceeded the previous four years. Upper Arrow ferry crossing has seen consistent annual growth since 2012. Needles crossing and Kootenay Lake crossing experienced significant growth in passenger volume in 2015 and 2016.

4.2 Key Markets

There is limited primary consumer data to support market visitation, however the various Community Tourism plans previously facilitated by Destination BC alongside current workshop dialogue in this destination development process have identified the following key markets for the West Kootenay/Revelstoke planning area:

- BC Residents with growing opportunity to attract the base of population centered around Kelowna as well as growing interest from the Lower Mainland
- US Residents particularly from the Spokane, WA area
- AB Residents
- Europe/UK – summer touring market as well as winter ski/snowboard
- Australia – winter ski/snowboard

In addition to the above markets that are drawn by outdoor recreation as well as the arts/culture/heritage Kootenay 'vibe', there is also opportunity related to:

- Meetings and retreats sector, specifically during the off-season period, with a goal to attract not only small to medium corporate meetings and retreats but also generate repeat leisure visitations from meeting participants.
- Sport tourism with facilities for a wide range of summer and winter events located throughout the planning area

Product/ Market Match

The table below identifies the current product and experience offerings and the market match. This chart is based on a review of various Community Tourism Foundations plans, workshop discussions, input from this planning process, Destination BC market reports, and facilitator knowledge:

Products/Experiences	Local	Lower Mainland	Rest of BC	Alberta	Wash.	Int'l	Comments
Touring/Exploring	X	x	x	x	x	x	Int'l: Australia, Germany, UK
Hiking	X	x	x	x	x	x	Growth Market
Rock Climbing	X	x	x	x	x		Potential
Skiing/Snowboarding	X	x	x	x	x	x	Growth Market
Mountain Biking	X	x	x	x	x	x	Growth market
Road Cycling	X	x	x		x		Growth market
Motorcycling		x	x	x	x		
Lakes/rivers	X	x	x	x	x		Family market
Aboriginal		x	x	x	x	x	Potential. Int'l: Germany, UK
Destination festivals– arts, culture, heritage	X	x	x	x	x		Growth Market

Camping		x	x	x			Growth Market
Spa, health and wellness		x	x	x	x	x	Growth Market
Winter experiences – snowshoe, Nordic	X		x				
Sport Tourism		x	x				Growth Market
Culinary/Agritourism	X	x	x				Potential

4.3 Visitor Characteristics

Visitor Centre statistics for 2014 and 2015 were reviewed for Rossland, Trail, Castlegar, Creston, Kaslo, Nakusp, New Denver, Nelson and Revelstoke. These statistics indicates that the planning area is primarily reliant on the BC and AB markets. Travellers from Europe are typically the third largest area of origin. Revelstoke, likely due to its location on the TransCanada Highway shows visitation from all geographic markets.

Visitor Centre data may not necessarily reflect the visitor profile in its entirety as not all visitors use the visitor Centre. Further, some Visitor Centres are only seasonally open (summer) and cannot therefore capture any of the significant winter visitation that arrives primarily for skiing/snowboarding.

Visitor Centre statistics for 2014 and 2015 also reveal that that vast majority of those stopping by are in the destination for the day only. Only Revelstoke reported greater one night stays than same day stays in its Visitor Centre. Clearly, the implication for destination development is to invest in the destination in a manner that encourages longer lengths of stay.

4.4 Psychographic - Market Segmentation

Rather than marketing to or developing products for travellers based on traditional segments, such as demographics (e.g. age, gender, income) or geography, Explorer Types (EQ) emphasizes the importance of traveller segmentation based on their psychological characteristics, such as their attitudes, beliefs, values, motivations, and behaviours. When various psychological characteristics are combined, different types of travellers emerge.

Destination BC activity targets three of the twelve North American EQ segmentation types - Authentic Experiencers, Cultural Explorers and Free Spirits. For the West Kootenay/Revelstoke planning area, the EQ type Gentle Explorer is also relevant as they are frequent travellers that return to past destinations and enjoy the security of familiar surroundings. (EQ types are outlined in Section 2.3.4).

Further, people are motivated to travel by their passions/interests, and research has shown that focusing on passions can create a higher potential for creating active consideration for BC and visitation to a destination.

Visitors to the West Kootenay/Revelstoke planning area may differ in a number of ways, including their expectations, attitudes, motivations, interests, passions, and willingness to pay for a tourism experience. It is important to consider these market segmentations in devleopent plans. Currently, the following interest groups and passions are identified:

Skiing/Snowboarding	**Hiking**	**Lake/River based paddling, boating**	**Health/Wellness**	**Dining/Shopping**
Heli/Catskiing	**Getaways to Disconnect**	**Festivals and Events**	**Backcountry Immersion**	**Family camping**
Family Vacations	**Mountain Biking**	**Heritage**	**Arts (e.g., fine arts, performance arts)**	**Agri-tourism/ Culinary**

5 WEST KOOTENAY/REVELSTOKE DESTINATION ASSESSMENT

5.1 Summary of Demand Generators/Experience Enhancers

Unique Selling Proposition

The unique selling proposition and key destination differentiators of West Kootenay/Revelstoke planning area include:

1. Epic big mountain adventure and deep powder snow accessible at a range of resorts, a concentration of heli and cat ski operations and accessible backcountry
    a. The snow is deep, dry and reliable
    b. Resort experiences combine with authentic towns for the best of both
    c. Backcountry powder is easily available through self-guided access or with one of many cat ski and heli ski operators
2. Access to nature and outdoor adventure that surrounds, inspires and defines each moment spent here
    a. Sheer number of mountains, parks and accompanying scenic beauty
    b. A growing number of world class trail experiences (e.g. Seven Summits) for hiking, mountain biking
    c. A wealth of freshwater lakes and rivers along with a wide range of paddling, angling and float experiences
3. A community 'sense of place' that incorporates a commitment to healthly living manifested in fresh organic produce, locally sourced restaurant menus, a propensity to find joy in physical activity and a access to a wide range of wellness services and hotsprings incluidng remote/undevelopedsites to full service hot springs with spas and accommodation
4. Arts, Culture & Heritage and the Kootenay 'vibe'
    a. A depth of artists and artisans hand crafting and sharing their works
    b. An intriguing history and heritage that embraces cultural diversity

c. Festivals and events celebrating a range of interests all year long.

Specific Product Experiences

In addition, there are specific product experiences that are or have potential as iconic products/experiences for growth:

- Revelstoke/Revelstoke Mountain Resort
- Rossland/Red Mountain – ski/snowboard experience
- Nelson/Whitewater Ski Resort
- Density of cat and heli ski opportunities through various operators
- Mountain Biking – Seven Summits and other trails (existing or in development)
- Rail Trails (within the planning area and connecting to larger cross region/cross Province and cross country routes)
- Aboriginal cultural tourism – K'tunaxa expansion of cultural offerings from bases such as Ainsworth Hot Springs
- Art/Artisan Tours
- Heritage Highway
- Lake Boating – Kootenay Lake, Slocan Lake, Arrow Lakes
- Health & Wellness – hotsprings throughout the planning area
- Agritourism and Field to Table experiences – Creston, Slocan Valley, Nelson, Castlegar, Trail, Rossland
- Sport Tourism – Castlegar, Trail, Rossland
- Meetings/Conferences – Nelson, Castlegar, Trail, Rossland

5.2 Destination Assessment

The following assessment of the West Kootenay/Revelstoke planning area as a visitor destination is derived from a distillation of interviews, stakeholder workshops, review of relevant community planning reports and facilitator knowledge of the area.

There are currently multiple iconic demand generators and an abundance of additional experiences having potential to further increase visitor interest in travelling to the West Kootenay/Revelstoke planning area. However, as a relatively remote destination with visitor volumes that allow most businesses to survive rather than flourish, there are gaps in it's experiential offerings to visitors. The ability to address these gaps is compounded by resource challenges - a relatively small population with limited financial and human resource capacity.

There are clusters of tourism experiences that have succeeded in creating a critical mass of remarkable experiences that motivate travel to these destinations – Revelstoke, Nelson, Rossland are examples of the kind of year round tourism success that is possible in the West Kootenay/Revelstoke planning area. However, between these destinations are rural areas that are struggling to secure a level of visitation that can support business viability. There are isolated successful operations such as Retallack between Nakusp and Kaslo, and Ainsworth Hot Springs, and pockets of intense summer visitation in Kaslo and New Denver, but for other businesses and communities, destination development should consider opportunities for collaboration and leveraging to create collections of experiences that combine to offer a scope and scale necessary to motivate travel.

Some of the key areas to be addressed in the development of the destination development plan for the West Kootenay/Revelstoke planning area include:

- Enhanced collaboration and cooperation amongst all public and private stakeholders to ensure efforts across industries are focused on optimal use of resources and to ensure that efforts within the tourism sector are focused on 'growing the tourism pie' for the benefit of all rather than competing internally.
- Reliable access to the planning area is essential. Large urban population centres are a significant distance away (Vancouver and Calgary are both 7-8 hours drive). Road safety and road maintenance (particularly in winter) on all routes is fundamental to success. As travellers consider alternate, 'green' modes of travel, road shoulder widening for bicycles and infrastructure for electric bicycles and electric vehicles should be considered. Air access must be convenient, reliable and affordable. Capacity and wait times at inland ferries should not become deterrents to travel. Appropriate seasonal capacity and reliability of the inland ferries in the planning area will support destination success.
- Ease of movement and connectivity *within* the planning area is also important. Shuttle services between airports and destinations, between towns and nearby attractions/activities and between communities will enhance the density of visitor experiences that can be readily accessed and thereby enhance the appeal of the destination.
- There is significant opportunity to fill capacity in the shoulder season and increase the utilization of existing and planned infrastructure and assets. The planning area needs to overcome multiple hurdles in order to be a true, four-season destination, including offering consistent business hours in existing operations and providing additional, attractive year-round activities and services, some of which are weather-independent to support spring/autumn visitation.
- Due to the diversity of outdoor adventure activities, there are numerous potential issues that could curtail growth in any one area. Potential barriers include land access challenges (use/maintenance of resource roads, tenure of other sectors like forestry/mining as well as potential conflicts between public/commercial use, motorized and non-motorized use), and other government regulatory requirements related to use of reservoirs, access to dyking districts etc.
- The current strength of outdoor activities and potential for growth must be balanced with the natural carrying capacity of the affected land and water-based ecosystems to ensure that the very factors that attract visitors are not undermined and that long-term environmental sustainability is considered throughout destination development.
- Many of the outdoor activities the area is known for rely on networks of trails – the rationalization and/or expansion of trail networks must be considered strategically across communities alongside potential links and connections between communities bearing in mind the need to legalize trails and then maintain them to appropriate standards given limited resources/volunteer time to do so.
- Signage and wayfinding strategies are needed in the front, mid and backcountry. While signage is improving, many of the planning area's experiences are remain difficult to locate and navigate.
- Significant opportunity exists to enhance the Aboriginal cultural product and experience and the visible presence of First Nations in their traditional territories.
- The West Kootenay/Revelstoke planning area has a growing depth of arts and culture offerings (East Shore of Kootenay Lake artisans, Nelson as a cultural hub, Castlegar Sculpture Walk etc.). This is complimented by intriguing heritage interpretation (Trail's Italian heritage, Castlegar's Doukhobour history, Revelstoke's railway history and the mining history of the entire area). However, destination success requires that these experiences collaborate and cooperate to create a combined depth and density that will motivate travel.
- Similarly the planning area has a growing agriculture, agri-tourism, culinary scene (craft breweries, locally sourced, organic menus etc.) but these experiences individually are too isolated and limited to truly contribute to destination growth. Collaboration and cooperation to create a depth and density of experiences to motivate travel is needed.

- There are many existing festivals and events, however the roster across communities is not well coordinated creating conflicts around dates. Many events are at capacity, in terms of footprint, resources and volunteer capacity. Yet there is significant potential to enhance the year-round visitation from festivals and events, and support the strengths of the destination as well as benefits for residents.
- There are significant human resource challenges that need to be addressed, including access to adequate, skilled staff (including potential need for foreign workers), affordable training programs designed to enhance skill levels and an inventory of affordable housing in which staff or fledging entrepreneurs can live. All of these factors are critical elements to business success and the ability to enhance the visitor experience.
- Lack of sufficient support (or lack of knowledge of the support that is available) for small businesses/ entrepreneurs is considered an ongoing constraint to tourism growth. Business support includes guiding through processes and approvals, mentoring, business planning and grant assistance, as well as addressing more specific hurdles such as access to affordable liability insurance.

A destination assessment is an integral component of Destination BC's destination planning program to provide an important overview of the strength of the planning area as a destination for visitors. The Assessment looks at the destination resources, assets, infrastructure and policies that make a destination competitive. The Assessment has been organized into four sections:

1. Destination readiness – looking at general attributes of the destination and travel to and within the destination.
2. Tourism assets and experiences – looking at the entire range of tourism resources and assets, and the delivery of experiences.
3. Support services infrastructure – looking at the infrastructure that supports the industry, such as the accommodation sector.
4. Enabling context – looking at the planning, policies and resources that enable the industry to thrive sustainably.

The intent for this project is to have a representative sample of industry stakeholders complete a quantitative assessment. However, this survey will not be complete until later in the process. As such, the information below has been provided by the facilitator, based on infromation provided in the process to date, including: stakeholders feedback on worksheets, interviews, in-destination site visits and the post Session 2 survey; Session 1 and Session 2 workshops; and the personal experiences from travelling throughout the area for over 10 years.

This section of the report will be updated once the survey is active and complete.

Overall Assessment
There are currently multiple iconic demand generators and an abundance of additional experiences having potential to further increase visitor interest in travelling to the West Kootenay/Revelstoke planning area. However, as a relatively remote destination with visitor volumes that allow most businesses to survive rather than flourish, there are gaps in it's experiential offerings to visitors. The ability to address these gaps is compounded by resource challenges - a relatively small population with limited financial and human resource capacity. There are clusters of tourism experiences that have succeeded in creating a critical mass of remarkable experiences that motivate travel to these destinations – Revelstoke, Nelson, Rossland are examples of the kind of year round tourism success that is possible in the West Kootenay/Revelstoke planning area. However, between these destinations are rural areas that are struggling to secure a level of visitation that can support business viability. There are isolated successful operations such as Retallack between Nakusp and Kaslo, and Ainsworth Hot Springs, and pockets of intense summer visitation in Kaslo and New Denver, but for other businesses and communities, destination development must first consider opportunities for collaboration and leveraging to create collections of experiences that combine to offer a scope and scale necessary to motivate travel.

Destination Readiness	
General Attributes	• The natural environment has significant appeal with an abundance of lakes, rivers, hotsprings, mountain ranges and parks. However, conflicts on the land base between motrized and non-motorized user groups and between public recreation and commercial tenure holders can lead to experiential disappointment. Access is also an issue. • For the most part, the built environment (cities, towns and villages) has aesthetic appeal to tourists. Most communities have invested in restoration of heritage buildings, landscaping and downtown beautification but more can always be done. • There is a distinctive energy or 'vibe' in Kootenay communities – a celebration of diversity and acceptance of alternative lifestyles that is both intriguing and appealing to visitors
Travel to the Destination	• There is scheduled air access to West Kootenay Airport (Castlegar), Trail Airport and Revelstoke however, outside of summer, there is a risk of flight cancellation due to low lying fog and limited visibility that has created a reputation for unreliability. • The area is many hours from any large urban centre, so most travel by visitors is by private vehicle. Roads are scenic, windy and for the most part well maintained although icy conditions during autumn/winter/spring still occur. • There is a scheduled shuttle service between West Kootenay Airport and Nelson. Shuttle service from Spokane Airport to Rossland and Nelson is offered in winter to

	support skier visits. A shuttle service from Kelowna Airport is desired. • Inland ferry service is offered across both Upper and Lower Arrow Lakes (Galena Bay – Shelter Bay; Fauquier Needles) creates a bottleneck during high season with long delays and wait times. There are limited services at ferry landings exacerbating the sense of delay. • BC Ferries offers regular scheduled ferry service, although service interruptions have occurred without adequate backup or visitor communications. While some view the ferry as adding to the overall experience, others view the ferry as detracting, in particular during peak times and service interruptions, when lineups can occur. Most ferry vessels are clean and provide good visitor amenities (Queen of Burnaby is being replaced), however improvements can be made to the main Langdale terminal, in particularly for indoor seating and amenities during poor weather. • Travel by vehicle is supported by adequate support services, e.g., gas stations, roadside emergency services, signage/directions, etc. There are few rest areas; the appeal of the destination could be improved with additional view stops.
Transportation and Access within the Destination	• There is limited transit within the planning area and a desire for scheduled bus service from Revelstoke to Nelson. • There is very little transportation available to travel between communities and major points of interest. • Road cycling is scenic but considered unsafe in many areas due to the narrow shoulders and large industrial truck traffic • Resource roads are essential links to outdoor recreation and attractions however there is uncertainty around management, maintenance and unanticipated deactivation that should be addressed together with FLNRO

Tourism Assets and Experiences	
	•
Natural Resource-Based Tourism Assets and Experiences	• The destination has natural attractions and designated landscapes (regional parks, provincial parks) that draw visitors to the area along a growing network of trails in/adjacent to all communities. Some of these natural attractions and designated landscapes are serviced by tourism operators, but opportunities exist to offer more guided access, equipment rentals etc. • Freshwater-based recreational activities are available and attract visitors to the area (paddling, boating, swimming). • High concentration of easily accessible hot springs in natural or commercial settings • Angling opportunities are available and attract visitors to the area. • The natural landscape (scenic and biodiversity) is well protected in some areas

	and is generally managed for balanced use. There are few land use management plans and a desire by stakeholders for more land use certainty. • Visitors are made aware of some of the destination's natural heritage values, including signage and information on key attractors, particularly where these occur in BC Parks or key areas managed by Recreation/Sites/Trails. There appears to be an increase of people accessing trails/back-country trails with little knowledge of risks and skills needed, e.g., safety, survival skills. • Winter outdoor recreation is significant and includes downhill skiing/snowboarding (in resort settings as well as backcountry access), Nordic skiing on trails groomed and maintained by local clubs, snowshoeing • Snowmobiling is also significant winter activity and economic contributor especially around Revelstoke and New Denver • Nature-based tourism assets have been improved to provide access to visitors with disabilities, however more can be done. • Tourism use levels are not generally adversely affecting natural assets or the visitor experience • The destination has an attractive range of trail systems that draw visitors to the area for hiking, mountain biking, canoeing and kayaking. • There are trails available for off-road vehicles but the destination is primarily known for its non-motorized recreation • The trails are well managed by local community groups. Trail infrastructure and supportive amenities such as huts have been developed. Access to trail heads for the area's top trails is good and parking is adequate with several exception such as Idaho Peak. There is a concern however that as trail networks grow, the capacity of volunteer organizations to maintain them will be stretched thin. • Connectivity between trails within the region and beyond the region are being considered, but more work can be done to make them market-ready. Gaps in the trail networks have not been fully identified and strategies are needed to address these gaps. • Trail experiences have not been developed and integrated with other adjacent attractions and complementary experiences to their potential.
Cultural Heritage	• The destination has few Aboriginal cultural tourism attractions that draw visitors to the area although some are now being considered by the K'tunaxa Nation • The destination has many cultural and heritage attractions that that enhance a visit and further collaboration to create a themed series of experiences along a cultural or heritage route has potential to become a trip motivator for a segment of the market • Local government has a strong commitment to protecting and enhancing cultural and heritage assets as tourism products. • The destination has a strong arts community and a good culture performance sector based on the size of communities. • A growing number of agritourism operators and opportunities to experience rural lifestyles are available. Locally grown produce is often featured in restaurant menus • Farmers' markets are available in spring to fall.

	• Several communities in the area have built a reputation for artisan arts and crafts products, although not for First Nations artisan arts and crafts products specifically.
Other tourism attractions and supporting infrastructure and services	• There is a lack of fun-themed attractions that are widely appealing and widely accessible that draw visitors to the area. • Dining opportunities at a range of price points are readily available in the peak summer and winter season in anchor communities and more limited through the rest of the year and rest of the planning area. Many businesses close in evenings or specific days, which leaves limited options. • The retail shopping experience is a key aspect of the overall visitor experience in communities such as Nelson, Kaslo, Rossland, Revelstoke with efforts to drive further vibrancy is downtown cores elsewhere in the planning area. • The visitor is well serviced by Visitor Services in each community. Efforts can be made to increase engagement.
Delivery of experiences	• There are limited visitor experiences in spring and fall. • Not all operators regularly partner to develop and deliver engaging and innovative experiences. • The visitor can develop some understanding of the destination’s key stories from the experiences that are offered. Visitors are able to select from a relatively limited selection of developed experiences that enable them to understand the essence of what makes the destination distinctive. • The destination stages a spectrum of cultural heritage/ nature events/festivals that attract overnight visitors. • The destination promotes itself as part of larger driving routes or circle tours that are designed to enrich the visitor experience. • For the most part, through direct engagement with businesses, visitors can easily purchase/book experiences and activities in advance. • There are some activity operators that can assist visitors experience the nature-based and/or water-based assets more effectively. • There are few tour guides that offer visitors a more personalized experience. • The destination offers integrated resort experiences of varying qualities.
Sporting activities, venues and facilities, including winter sports	• There are indoor sporting facilities (e.g. arena, aquatic centre) that are used by visitors, but this would predominantly be for sporting events and visiting friends and family. • There are several excellent 18-hole golf courses that are used by visitors. • There are outdoor sporting facilities (e.g. playing fields) that are regularly used by visitors, in particular for sporting events including the alpine training centre in Rossland. • Some parts of the destination regularly hold sporting competitions/ events that attract overnight competitors and spectators, i.e., Castlegar, Trail, Rossland. • 3 major ski resorts and 2 community ski hills and several Nordic centres that constitute a major draw in the winter and can host competitions and events

Support Services Infrastructure	
Accommodation and related facilities	• The destination offers a variety of fixed-roof accommodation facilities of varying quality. There are no branded hotels well known to international visitors and few quality, high-end offerings. Many of the existing hotels/motels may benefit from updating. • New accommodation offerings have (or will be) opened in Revelstoke, Rossland and significant capital investments are being made in older properties in Trail, Nelson. • Additional public camping facilities would be beneficial for the peak season, as would increasing the season length. • There is inadequate commercial (privately owned) camping facilities for the peak season. The destination would benefit from an increase in commercial (privately owned) camping facilities.
Meeting, conference and other supportive facilities	• The destination has several meeting and conference facilities that provide full service (turn-key) event assistance and these are typically associated with a hotel property • In general, great improvements have been made in the cell coverage and internet connectivity, although there are still gaps in service

Enabling Context	
Planning and policy	• Local governments are generally reactive to the development of tourism through economic incentives or investment attraction strategies, as opposed to taking a proactive approach. • The K'tunaxa are now more actively investing in tourism opportunities as part of their economic development mandate • Land-use planning is playing a more significant role in the development of tourism, with considerable uncertainty and lack of long-term agreements still evident. • BC Parks Future Strategy includes investment in additional campsites that will benefit the planning area • Agricultural Area Plans support development of agritourism within the limitation of Agricultural Land Reserve restrictions. • There seems to be growing political support for the tourism industry. • There is mixed support for the tourism industry from the community, as other industries, general population growth, environmental concerns, and residents' way of life are considered.

	• Provincial Government ministries and agencies have varying degrees of knowledge of the destination and some areas are more actively involved in tourism development, such as Rec Sites & Trails, Transportation, and BC Parks. • The management plans for designated landscapes that benefit tourism (e.g. Provincial Parks) are not all current and do not seek to optimize the relevant assets.
Tourism human resources	• Local residents can access post-secondary educational and training programs that offer tourism related programs to a limited degree. • WorldHost® programs, and other front line customer services training, are periodically hosted within the destination. • Some efforts are taken to ensure that frontline staff are knowledgeable of the local area and are able to provide accurate information and helpful suggestions to visitors that provide economic benefit but it is generally felt that much more could be done • The destination is adversely impacted by human resource recruitment and retention issues as staffing shortages are evident. • A shortfall of affordable housing options is exacerbating staff hiring and retention challenges. • Economic development and tourism organizations have some working knowledge of relevant labour policies, but not robust. • There is strong volunteer capacity to host festivals and events, however that capacity is maxed out and hinders the ability for events to grow.
Financial resources and regulations	• Communities in the planning area have accessed a wide range of capital grants that benefit tourism however the capacity required to develop applications is sometimes limited • Economic development organizations and staff generally have varying degrees of knowledge on the status of the tourism industry and opportunities for investment. • Banks and lending institutions do not seem to be as supportive of loan applications from the tourism industry as other industries. • The Municipal and Regional District Tax is in place in many communities in the planning area
	•
Sustainability	• There is clear evidence of a strong commitment to the principles of environmental sustainability by the tourism industry and community at large. • There are some policies and procedures in place to maintain high quality, water-based recreation areas, but other places lack regulations. • In general, tourism does not seem to negatively affect quality of life for residents, although peak weekends and specific areas raise acute concerns. • There is an emphasis on developing tourism in a way that maximizes local economic and social benefits.

	• Tourism is playing a positive role in assisting rural communities to transition from dependency on traditional sectors of the economy such as forestry. • In general, local residents and businesses are not aware of nor understand the importance of tourism. • Tourism providers are not generally encouraged to work toward certification or adopt relevant 'best practices'. • Visitor surveys on satisfaction have not been conducted on a regular basis. • Limited research and information is available to be knowledgeable and make informed decisions.

5.3 Key Comparables/Examples

Several case studies were developed with the intent to showcase comparable destinations that have focused on innovative tourism growth and may provide learnings appropriate for the West Kootenay/Revelstoke planning area.

5.3.1 Haida Gwaii

Haida Gwaii is an example of Aboriginal development as a demand generator. It is also an example of:

- Long-term planning and development based on guiding principles that were created by locals and that respects local cultures, heritage and way of life.
- Tourism development that restricts unsustainable growth.
- Focusing on destination strengths to create low-impact, high-yield tourism.
- Expanding tourism past core destination strengths to create additional assets.

Haida Gwaii, or "Islands of the People", is a remote yet remarkably historied archipelago that has been inhabited for over 13,000 years. The destination has many natural and heritage resources to work with. Gwaii Haanas National Park was named the best National Park in North America in 2005, and the park also protects the island of SGaang Gwaii, a UNESCO World Heritage Site. Destination development began early on when logging was blockaded by the Haida Nation and the governments of BC and Canada were obligated to reduce logging and create parkland.

In 1981, prior to Gwaii Haanas being designated a Haida Heritage Site or a National Park Reserve, the Skidegate Band Council and the Haida Nation created the "Haida Watchmen Program" in response to concerns about the potential for damage to old village sites, and to provide a venue to get the people back on the land. Volunteers who act as guardians camp for the summer season on five heritage sites. At the same time, they present visitors with "a first hand introduction to Haida culture by exposing them to Haida life and sharing their knowledge of the environs as well as stories, songs and dances associated with the sites". Their primary mandate is to protect these sensitive areas by educating visitors about the natural and cultural heritage.

In 1985, the South Moresby area was designated a Haida Heritage Site. Then in 1988, the area was designated a National Park Reserve in recognition of its notable natural and cultural heritage. This was followed in 1993 by the Gwaii Haanas Agreement, setting out the terms of a co-operative management between the Haida Nation and the Government of Canada.

In 2003, the Heritage Tourism Strategy was created by the Haida Gwaii/Queen Charlotte Islands Heritage Tourism Strategy Working Group. The strategy outlined actions to deliver on five integrated elements:

- The relationship between healthy ecosystems and our way of life.
- A deep and profound respect for Haida culture.
- A strong determination to preserve our unique island way of life.
- An inspired relationship to place.
- Community integrity and the importance of that which is local.

The opening statement of the strategy states “This document was developed through consultation with Islanders by Islanders, and outlines what is important about where and how we live and what we must do to protect, celebrate, and share our heritage. The success of the Heritage Tourism Strategy relies on the realization that all the definitions and objectives are linked, and must be respected and implemented equally. We welcome all visitors to Haida Gwaii/Queen Charlotte Islands who will respect and honour our definitions of heritage and the linked objectives and actions in this strategy.”

Then, in 2004, the Haida Nation Tourism Business Opportunities Plan was created. The purpose of this study was to “prepare an overall plan which will assist the Council of the Haida Nation in encouraging members of its community to develop financially and ecologically sustainable tourism businesses. These businesses will focus on high value-added tourism, where appropriate, resulting in significant contributions to the Haida Nation’s economic base, employment opportunities and community development.” The study looked at existing and potential tourism products and resources, a market assessment and an analysis of tourism opportunities based on a SWOT and product/market match.

A dream of the Haida peoples for decades, and under construction in 2004, the Haida Heritage Centre at Kay Llnagaay in particular is an impressive exhibit of destination development. Open in 2007, the award-winning cultural centre is the essence of the Haida Gwaii people and archipelago, and houses a carving house, a canoe house, a museum, a restaurant, teaching spaces, and more. The centre also offers a convention space, creating a new opportunity to attract businesses and conferences.

With the new Haida Heritage Centre, along with other tourism assets, the communities on Haida Gwaii decided to begin a comprehensive tourism planning initiative, beginning in November, 2007 and completed in October, 2009. This was a valuable resource to the industry that prepared the Islands to take the next step. They began this through Destination BC’s Community Tourism Foundations program, and agreed on a vision of “[growing] awareness of Haida Gwaii as a destination for high yield, low impact learning and adventure visitors”. An important part of this vision was ensuring the visitors were low-impact to preserve the natural beauty and ecosystem as well as the heritage of the islands.

Another important part of achieving the vision was to understand the potential markets and demand attractors of the destination experience. In 2009, the Misty Isles Economic Development Society spearheaded these efforts as the central tourism coordinator for development of the Haida Gwaii Destination Marketing Project. With the Haida Heritage Centre and Gwaii Haanas National Park Reserve acting as focal points for the destination, the DMO also began expanding awareness of other elements of the destination. These additional low-impact activities have branched out to include sport fishing, kayaking, bird watching, viewing totem-poles, viewing First Nations art, surfing, visiting museums, and even learning about the local logging history.

5.3.2 Tofino & Ucluelet

The following example of the west coast of Vancouver Island highlights multiple aspects of tourism development in the West Kootenay/Revelstoke planning area, including land use management, understanding the economic benefits of tourism, sustainable development, and development of a year-round destination focus on the shoulder/winter season.[24]

Since the beginning of the 19th century, Tofino has attracted visitors, including cabins and hotels catering to both local residents working in the logging and fishing industry, and to tourists visiting on the Princess Maquinna from Victoria. However, it wasn't until 1971 when the Pacific Rim National Park officially opened and the road connecting Tofino to the rest of Vancouver Island was paved, that tourism grew significantly. In the 1980's the industry continued to grow with a key focus on wilderness ecotourism and wildlife viewing. Infrastructure supporting the new visitor base was developed, including high-end resorts, b&b's and air charters.

Tension between logging interests and tourism grew. Between 1981 and 1993, efforts were made to identify the value of tourism and resolve land-use conflicts, including:

- The Tofino-Long Beach Chamber of Commerce hired a consultant in 1988 to develop the *Tofino Regional Tourism Study* that identified scenic corridors used by tourism operators and visitors as "important tourist attractions and key visual landscapes";
- In 1989, the Steering Committee of the District of Tofino and Tofino-Long Beach Chamber of Commerce initiative a sustainable development strategy, which identified a need for "a regionally based Sustainable Integrated Forest Management Planning Team under the auspices of the Ministry of Forests";

After significant effort, the provincial government determined to increase the protected area in the Clayoquot Sound from 15% to 33% with the determination of scenic corridors. The efforts also resulted in the creation of the Clayoquot Sound UNESCO Biosphere Reserve, which added to the destination appeal and brought "the perspective of sustainable development to the area".

By 1989, tourism was a significant force in Tofino, with 149 out of 160 businesses directly related to tourism. By 1999, with a daily average of 22,000 in the peak summer season, residents had to respond to the influx by

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[24] *Understanding (Eco) Tourism from The Bottom-Up: A Case Study of Tofino, Clayoquot Sound, In British Columbia* by Annemarie De Andrade, The Faculty of Graduate Studies (Resource Management and Environmental Studies), UBC

"working as much as 12 hours a day catering to tourists, being forced to move to a campground due to the lack of affordable accommodation, or simply by having to cope with full parking lots". Accommodations were added (fixed roof and campgrounds) and private accommodations were offered to meet demand. Visitors were recommended to make reservations prior to visiting. A strong focus on providing visitors with access to information was taken to connect them to accommodations and activities, such as whale watching tours, fishing and undersea dive charters, charter float planes, hot springs tours, sea kayaking trips, hiking tours, rentals (bike, kayak and surf boards), personalized educational programs, and customized tours.

Due to the success and constraints in the summer months, and the desire for year-round visitation and economic sustainability, significant effort shifted to growing the fall, winter and spring seasons. To generate visitation in the off-season, the owner of the Wickininnish Inn created a successful marketing campaign focused on storm-watching, which has led to the development of a new winter demand generator for the entire west coast. Efforts by the tourism organizations also focused on new year-round experiences such as guided water-based activities, festivals and events, culinary experiences, and shops and galleries.

The West Coast gained further traction as a destination when Ucluelet started to develop their tourism product and infrastructure. Currently, tourism is recognized by the community as the "most important sector in supporting the community's future economy"[25].

Acknowledging one of the defining features of Ucluelet is that it remains an authentic fishing community, the Ucluelet Economic Development Strategy identifies ways to improve the harbour experience for visitors, provided they do not infringe on commercial operations. Knowing that marine-based commercial tourism operators are a draw for the area, the plan also identifies the importance of managing potential conflicts between the two sectors. The plan also highlights the need for the development of new attractions and activities, including services such as retailers, restaurants, recreation companies, etc. that will appeal to tourists but also cater to local residents.

While the two communities promote themselves uniquely through two DMOs, there are collaborative efforts and many operators promote and support the development of the area as one destination when appropriate.

Both the Tla-o-qui-aht First Nation and Yuułuʔiłʔatḥ First Nation are active in the tourism sector, generating economic benefits from the visitor economy and creating new products and experiences that only enhance the overall destination appeal, e.g., Wya Point Surf Shop & Café and Wya Point Resort.

As for the result, tourism continues to grow for the entire region. Room revenues in Tofino and Ucluelet combined increased from $25.4 million in 2002 to $42.5 million in 2012. Tofino accounts for about 75-80% of the total revenue, with Ucluelet's proportion of room revenues increasing steadily from about 15% in 2007 to 25% in 2012.[26]

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[25] Ucluelet Economic Development Strategy, April 2012

[26] *Draft Tofino Community Based Tourism Master Plan*, June 2014, Centre for Sustainability Whistler

5.3.3 Okanagan Rail Trail

The Okanagan Rail Trail is an example of:

- A full strategic planning, destination development process, including all stakeholders in the area.
- Alignment of strategy from the provincial level, to a regional level, to a sub-regional level, to the individual tourism business level - all plans are aligned in developing and marketing trails.
- Creating a new and/or enhanced experience to attract visitors, and provide something unique in marketing initiatives.

Over history people of all ages have been fascinated with the Railway. It is therefore not surprising that there is a sense of melancholy as train routes over time have been replaced by other less costly and more efficient modes of transportation.

Today in many locations, and specifically within the Thompson Okanagan, these former rail lines have been and are being reinvented through the Rails to Trails initiatives. Hundreds of miles of rail line reborn as trails for outdoor enthusiasts. Fortunately, the rail lines for the most part were built with less than a 3% grade in order for the trains of the day to be able to navigate the routes thus providing trails that are quite accessible for many ages and abilities. These trails not only provide communities with healthy outdoor recreational options but create the strong potential for increased domestic and international tourism visitors.

In BC, there is a Provincial Trails strategy that was created by the Recreation Sites and Trails department in the Ministry of Forests, Lands and Natural Resource Operations. The strategy was developed in a spirit of partnership. It is a collaboration of provincial agencies, recreation organizations, local governments, land users, First Nations, and others across BC. The vision of the strategy is “a 'world-renowned', sustainable network of trails, with opportunities for all, which provides benefits for trails users, communities and the province”.

The Thompson Okanagan Tourism Association, in their 10-year tourism strategy for the region, identified trails as an experience-based theme to strengthen their identity as a destination. They have embarked on the process of developing a specific Tourism Trails Strategy for their entire region.

The aspiration is that from the provincial level, to a regional level, to a sub-regional level, to the individual tourism business level, all plans are aligned in developing and marketing trails.

To that end, TOTA with the support of Destination BC brought together hundreds of industry stakeholders and community leaders over the course of 2015 and 2016 to complete a Rail Trail Tourism Strategy that will assist in ensuring these Rail Trails are not only established, but that there is a plan in place for their longer-term development and ongoing maintenance allowing for future generations to enjoy the trails as well as the stories and history of these great routes. Efforts to date to enhance the trail system included:

- Myra Canyon section of the railway was designated a National Historic Site of Canada in 2002.
- Safety improvements including clearing and rock face stabilization along the line have taken place.
- A formalized agreement was put in place in 2014 to clearly articulate the non-motorized parts of the trail.
- The Province constructed a parking area, turnaround signs and an accessible trail to a popular tunnel.

- Businesses along these former rail corridors are developing or redeveloping themselves to provide services to the growing number of visitors to these trails.
- Destination BC and TOTA also worked closely on bringing the Remarkable Experiences Business Development pilot to the Kettle Valley. The program brought together 10 operators of various sizes and types from Christina Lake to Summerland that all play a role in the Kettle Valley Rail Trail experience. Through workshops and training these business operators saw the potential for their products and services, explored opportunities to create new remarkable experiences for visitors, expanded their reach online, and realized that they were better and stronger working together as collaborators than as competitors.

5.3.4 Discovery Islands

The Discovery Islands is an example of the forestry industry, tourism industry and government finding common solutions to reducing land use conflict.[27]

A global ecotourism destination, the Discovery Islands understand the need to protect their forests more than most. The destination hosted Canada's first sea kayak expedition company, of which there were nine by 2007. Building new resorts and renovating old ones, the islands held 28 lodges, resorts, and marinas by 2010, and supported over 150 tourism businesses. After Tofino, the Discovery Islands are probably the most important economically valuable marine wilderness destination in all of BC.

This ecotourism was threatened in 2004 when the government enacted the Forest and Range Practices Act, allowing logging companies to manage forests without requiring government consultation. With a rapidly increasing demand for logs, resulting in clear cuts that threatened the ecotourism of the Discovery Islands both aesthetically and ethically. Not only was the ecosystem of the Discovery Islands under attack, the revenues generated by the tourism sector were likely to suffer.

To combat the potential damages forestry could cause the fragile, ecosystem-dependent tourism sector, various stakeholders mobilized. This included local businesses. In addition, the Ministry of Forestry, Lands and Natural Resource Operations began working to find an agreeable model of foresting that would allow that sector to cooperate with the tourism sector. This process includes workshops that would create an appropriate dialogue between the two sectors, and communication would prove key in these negotiations.

Because of these collaborations, computer modelling was undertaken to reduce visual impact from logging on visible areas on the islands. The method of moving the harvested logs was also changed from log dumping to barging to preserve construction and visible logging activity, and barging activities were stopped during peak tourism months. Both sectors were thus able to contribute significant revenues to the area and to the provincial economy. The Truck Loggers Associations president Don Banasky went as far as to say that "the successful cohabitation between logging and tourism on Maurelle Island this summer is worth celebrating."

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[27] Sources: *Wilderness Tourism: The Other Forest Industry*, Ralph Keller, BC Forest Professional; *Protecting Old-Growth Rainforests to the Economic Benefit of Tourism-Based Communities*, Ancient Forest Alliance, May 30, 2016; *North Island Central Coast Forestry Management Leaderships Team Meeting Minutes*, January 15, 2014, MFLNRO; *Logging and Tourism Create Win-Win*, Don Banasky

5.4 SWOT/Destination Potential Analysis

Strengths

- Incredible natural assets (mountains, lakes, rivers)
- Big mountain adventure in all seasons
- Accessible backcountry and a growing network of trails
- Unique communities each with their own interpretation of the Kootenay 'vibe'
- Rich and intriguing history and heritage
- Depth of artists and artisans sharing unique, one-of-a-kind works
- Fertile agricultural lands and growing reputation for organic
- Committed and active group of volunteers working on festivals, event, arts and trail development.
- Variety of supporting economic development and funding organizations.
- Sport tourism facilities and reputation
- Education institutions drawing international students

Weaknesses

- Frontline service levels and quality of experience at tourism businesses inconsistent
- Dependency on the peak summer and winter season, with severe decline of visitation in the off-season.
- Transportation barriers to and within the destination.
- Lack of larger meeting facilities.
- Limited number of quality / higher-end accommodation in some smaller communities.
- The area has nature-based assets that offer potential new experiences but require operators and guides to facilitate such.
- Range of issues associated with water-based tourism including lack of moorage capacity, and limited access to pump stations and gas docks.
- Restaurant availability particularly in low season.
- Insufficient local government support for new business development.
- Volunteer persons staging events face issues including aging, burnout and lack of succession planning.
- Staff constraints, including skillsets, transportation, housing and year-round sustainability.
- Local residents do not sufficiently value tourism as a key element of their economy.
- Varying degrees of knowledge on the tourism industry from economic development and government staff.
- Lack of certainty for land and water based tourism businesses and experiences.
- Lack of resources to support maintenance and upkeep of existing nature-base assets, e.g., trails, parks.

Opportunities

- Wifi coming to ferry landings; enhanced wifi and cell coverage throughout key travel corridors
- Cultural tourism development including additional signature festivals and events, Aboriginal cultural experiences

- Continued local trail development with strategic interconnectivity
- Interest in agritourism, car-free tourism, culinary tourism, wineries, cideries, breweries and distilleries is increasing.[28]
- Marketing generated by sector marketing organizations and co-operative partnerships, including BC Ale Trail, Ski Consortium, Mountain Biking.
- Lower Canadian dollar makes West Kootenay/Revelstoke area attractive to US market and for staycations.

Threats

- Climate change.
- Value of Canadian dollar.
- Rules and restrictions that hinder development – all levels of government.
- Sharing economy. Airbnb rentals do not collect MRDT.
- Residents do not fully understand how tourism benefits the community.
- Changing demographics may shift demand for certain travel experiences.
- Lack of tourism staff and hindering labour laws, e.g., foreign workers.

5.5 Summary of Relevant Constraints & Opportunities

The following constraints and opportunities were identified by stakeholder interviews and by participants of the Session 2 workshops (Nakusp, Ainsworth Hot Springs, Trail). These were then sent to a broader stakeholder group through a survey for validation and prioritization (online survey to over 170 stakeholders, November 14-27). The 68 respondents were asked how important it is to address the identified constraints and opportunities with ratings from 1 to 5, with 1 being "not important" and 5 being "absolutely critical".

The top 15 identified constraints and opportunities are noted below.

Constraints have been colour-coded to highlight the focus on 4 primary constraint categories (all constraints provided for information purposes):

Constraints related to communities and residents – TOP 3

Constraints related to use and management of the land base – 6 OF TOP 15

Constraints related to business operating conditions – 2 OF TOP 15

Constraints related to access to and within the planning area – 4 OF TOP 1

[28] Sunshine Coast Agricultural Area Plan, 2015

Top 15 identified constraints:

Rank	Constraint	Average
1	Capacity of small-town character to support growth/development	4.58
2	Community knowledge of value of tourism	4.51
3	Resident attitudes toward visitors	4.42
4	Conflicting use of land base within tourism (motorized vs. non-motorized)	4.23
5	Inadequate base of year round visitation to support business viability	4.22
6	Winter road maintenance	4.18
7	Maintenance of resource roads (that are not deactivated)	4.17
8	Capacity of backcountry to support increased use	4.15
9	Transportation options to connect communities and activities	4.09
10	Lack of an inventory of affordable housing for staff and entrepreneurs	4.09
11	Backcountry use policies (access, wildlife, habitat protection, etc.)	4.07
12	Impacts of climate change	4.05
13	Deactivation and/or maintenance of resource roads	4.03
14	Conflicting use of land base with other industries – forestry	4.03
15	Transportation options to connect communities to airports	4.01
16	Transportation options to connect communities to each other	4.01
17	Lack of support for existing and new small business operators	4.00
18	Lack of qualified staff	4.00
19	Lack of reliable air access	3.99
20	Lack of shoulders for road cycling	3.98
21	Volunteer burnout	3.96
22	Limited access to capital for entry or expansion of businesses	3.93
23	Cycling friendly policies	3.91
24	Capacity of waterways to support increased use	3.88
25	Inadequate signage (highways, trails, access points etc.)	3.87
26	Inadequate resources for trail maintenance	3.86
27	Lack of trail development around some communities	3.85
28	Conflicting use of land base within tourism (commercial vs. public use)	3.85
29	Lack of policies related to sharing economy e.g. Air BnB	3.85
30	Signage policies	3.79
31	Liability insurance is prohibitively expensive	3.79
32	Difficult to navigate the assistance to entrepreneurs that is available	3.71
33	Lack of high season camping capacity	3.66
34	Policies regarding use of agricultural land	3.62
35	Event related policies	3.55
36	Liquor licensing policies	3.54
37	Water licensing policies	3.49
38	Inter-community rivalries and competition	3.48
39	Lack of soft adventure options	3.47
40	Lack of paid attractions that are accessible and attractive to a wide range of visitors	3.46
41	Limited water/sewage capacity within community	3.45
42	Lack of affordable air access	3.42

43	Policies re: use of reservoirs/insurance requirements for commercial operators	3.40
44	Access to labour/foreign workers policies	3.36
45	Expensive staff training programs	3.28
46	Lack of boat launches, moorage and boat pumpouts	3.01
47	Policies re: use of dyking districts/access to dykes	2.99
48	Lack of equipment rentals (land and water based)	2.98

Top 15 identified opportunities:

The top 15 identified opportunities are listed below along with all others identified and ranked. These opportunities align in catgeories as well:

Opportunities related to relationships and collaboration – 4 OF TOP 15

Opportunities related to trails and trail based experiences – 3 OF TOP 15

Opportunities related to business operating conditions – 2 OF TOP 15

Opportunities related to access to and within the planning area – 3 OF TOP 15

Rank	Opportunity	Average
1	Coordinate schedule of regional festivals and events to maximize visitor opportunity and associated economic impacts throughout region	4.49
2	Require winter tires of rental vehicles	4.42
3	Improved relationships with Provincial Ministries including consideration of value of tourism in decision making	4.41
4	Build local resident understanding of the value of tourism	4.32
5	Monitor and manage environmental carrying capacity to ensure health of ecosystems	4.31
6	Create supportive relationships within the tourism industry in the West Kootenays/Revelstoke	4.29
7	Create a supportive environment for existing and new small business operators	4.27
8	Further develop trail systems with strategic links between communities including rail trails; horseback trail riding; hiking	4.26
9	Attract qualified staff	4.22
10	Further develop mountain biking infrastructure/experiences & corridors like Kootenay Dirt (mountain biking equivalent of powder highway)	4.19
11	Provide reliable air access	4.17
12	Local government policies on sharing economy participation that are fair and equitable (zoning, hotel tax collection)	4.15
13	Provide transportation options from airport to communities	4.13
14	Create supportive relationships between tourism industry and other industries in the West Kootenays/Revelstoke	4.08
15	Increase campground capacity	4.07
16	Invest in trail maintenance (beyond volunteer time)	4.06

17	Provide access to capital for entry or expansion of businesses	4.03
18	Develop immersive agri-tourism experiences like farm to table/culinary/ craft brewing/distillery/cidery themed experiences	4.01
19	Further develop corridor as Heritage Highway - regional collection of arts/heritage/cultural/aboriginal based experiences	4.01
20	Monitor and manage social carrying capacity to ensure health of communities in the West Kootenays/Revelstoke	4.00
21	Further develop water-based experiences; guided activities and rental options, boat tours and supporting infrastructure (pump outs, boat launches) fishing, paddle wheeler, dam tours	3.99
22	Further develop road cycling infrastructure/ experiences	3.98
23	Develop wellness and personal growth themed experiences around hot springs, zen sports, unplugged backcountry immersion	3.97
24	Invest in cycling friendly infrastructure (road shoulders etc.)	3.95
25	Invest in additional trail development	3.94
26	Develop sport tourism infrastructure and organizational support to secure mid-size competitions, training	3.92
27	Develop additional soft adventure/paid attractions accessible and appealing to a wide audience (all ages/all abilities)	3.92
28	Create programs to educate residents on visitor experiences available	3.89
29	Provide transportation options between communities and activities	3.89
30	Invest in improved winter road maintenance	3.88
31	Improved access to labour policies that support tourism industry labour needs	3.88
32	Offer affordable liability insurance	3.88
33	Provide transportation options between communities	3.87
34	Create programs to share information about visitor experiences amongst businesses	3.84
35	Maintain an inventory of affordable housing for staff and entrepreneurs	3.83
36	Improve signage (highway, trails, access points etc.)	3.83
37	Further develop infrastructure/experiences along touring routes and circle tours including motorcycle touring	3.80
38	Offer affordable staff training programs	3.70
39	Provide additional river access points	3.53
40	Invest in additional boat launches, pump outs etc.	3.43
41	Increase water/sewer capacities in communities	3.42
42	Offer appropriately spaced electric vehicle charging stations	3.33

6. PLANNING ISSUES AND CONSIDERATIONS

The destination assessment gives rise to a series of planning issues and considerations that in turn provide the key direction(s) that the West Kootenay/Revelstoke planning area Destination Development Plan should address.

- The West Kootenay/Revelstoke planning area is home to many small communities and passionate individuals. While this passionate individualism and pride in community is a strength, the current limited density of motivating travel experiences across the entire planning area requires that collaboration occur throughout the planning area in order to plan infrastructure and amenities and create a sufficient depth and density of experiences to motivate travel to the West Kootenay/Revelstoke corridor and increase length of stay and associated spending.

- Transportation to and within the West Kootenay/Revelstoke planning area is considered a major constraint to the ability to grow tourism. This includes reliable air access, sufficient capacity on inland ferries and adequate levels of winter road maintenance. Transportation options to connect communities to airports, as well as transportation options to connect communities to various activities and to each other must also be addressed.

- While signage and wayfinding has been improving in recent years, continued improvements in the front, mid and backcountry will support destination development and ideally should include an element of interpretation of the history, heritage of the area. Investments made should be integrated so that there is consistency and visual reinforcement as the traveller moves through Maps and Apps to Physical Signage.

- There is significant opportunity to fill capacity in the shoulder season and increase the utilization of existing and planned infrastructure and assets. A strong focus on developing the destination in a way that attracts visitation and business more consistently for at least nine months of the year in a steadier flow is desired in order to support small business viability. Offering appropriate and consistent business hours of operation and increasing attractive year-round, weather protected infrastructure, weather insensitive activities, soft adventures offerings and services suitable for all ages and levels of expertise/fitness will be necessary.

- While growth in the outdoor adventure tourism sector has been strong, the Adventure Travel Trade Association predicts growth will slow over the next decade reaching a plateau in 2020. Key market segments for British Columbia's outdoor adventure products are aging. Physical limitations of aging participants may require businesses to address potential accessibility concerns. As the population ages, it is predicted the demand for soft adventure activities such as wildlife viewing and walking will grow. It is important for the West Kootenay/Revelstoke planning area to offer a range of product offerings to ensure interests meet the broad interests and physical limitations of all travellers.

- Due to the diversity of outdoor adventure activities, there are numerous potential issues that could curtail growth in any one area. Potential barriers include land access challenges (tenure to other sectors, resource road deactivation/maintenance), government regulatory requirements, and climate change impacts (e.g., declining snow packs). It was acknowledged that the high season summer camping capacity challenges in the area may be alleviated by the recent BC Parks announcements related to investments in additional campsites. As well, investments being made through Recreation, Sites and Trails can be leveraged for maximum return to visitors as well as residents.

- It is expected that conflicts between motorized and non-motorized recreation and between public recreation and commercial tenure holders will continue and a strong desire to convene a table to discuss these various interests and negotiate 'zones of use' that can be adopted by all.

- Trails are a significant motivator for the entire planning area with strong community support and robust planning work ongoing, strategies and actions are being implemented. These efforts should continue to be enhanced and supported. Sustainable funding sources for trail maintenance remain elusive however and volunteer burn-out is a concern. As well, additional engagement and dialogue is needed with regard to resource road access and maintenance to ensure that strategic resource roads providing access to important trail heads or recreation areas are identified and agreements/intentions related to deactivation, ongoing maintenance are addressed.

- Cyclists are coming to the area, and there is opportunity to grow road cycling visitation. However, shoulder widening is needed to enhance cyclist safety. The terrain of the planning area creates challenges and significant costs for shoulder widening (roads are described by MoTI staff as being squeezed between rivers and cliffs with little room for wider shoulders except at significant cost). However, the opportunity to identify a limited number of iconic cycling routes and focus on shoulder widening specific to these routes has been identified as worthy of further consideration.

- Water-based activities and experiences have been identified as a priority sector, yet there are gaps in infrastructure and services that are necessary to fully capitalize on the opportunity. There is need for additional access points, boat launches, safe harbours, fuel and pump-outs to both enhance the visitor experience and ensure that the quality of the resource and environmental impacts are appropriately managed. Additional equipment rentals, guided tours are felt necessary yet it will be up to the private sector and free market economy to identify and activate many of these opportunities.

- Significant opportunity exists to enhance the Aboriginal cultural product and experience. It is widely recognized that the Aboriginal tourism development needs to come from the First Nation communities. There is interest to support Aboriginal experiences as part of a destination stay.

- Many existing festivals and events are nearing capacity in terms of their footprint, resources and volunteer capacity. There continues to be date conflicts but the need for better coordination is understood and solutions are manifesting in growing support for a region-wide calendar. Some events are already travel motivators and other existing (or new) events are believed to have potential to draw overnight visitation. However, there is concern about additional burden on volunteers and a growing interest in resourcing a paid position to represent and support multiple communities in the planning area as an event coordinator.

- The West Kootenay/Revelstoke planning area has demonstrated that arts and culture are a tourism draw (East Shore/Crawford Bay, Nelson, Castlegar Sculpture Walk, Creston Bus Wine Art Tour etc.) and offer potential for further growth. Existing events can be expanded, and there is room to create an even stronger creative economy connecting the many small communities. Creative tourism is a growing trend and visitors are increasingly seeking authentic opportunities to develop new skills and expand existing skills.

- There is potential for developing a collection of heritage-related experiences to support longer stays. Each community has its own interesting heritage story to tell and the opportunity to work collaboratively to create themed routes that combine these experiences offers potential.

- There is an opportunity to creative a supportive business climate for tourism entrepreneurs – one that leads the Province. Existing support and resources through organizations like Community Futures, as well as the efforts of Imagine Kootenay, Lower Columbia Initiatives Corporation and others are recognized and valued but navigating these resources is still felt to be somewhat complex. Desired business support includes handholding through processes and approvals, mentoring, business plan development and grant assistance, etc. Opportunities exist to streamline government process, and to address specific challenges such as prohibitive costs associated with liability insurance.

- There are significant opportunities to improve local government and community support of tourism and tourism businesses. Resident support is an important part of the development of the destination, yet not everyone understands what tourism is, the benefits and the support needed.

- The capacity of small towns to retain and preserve their character throughout destination development is of paramount importance to many. The needed support for tourism and tourism businesses will only occur if there is confidence that this character is being honored and protected.

- The visitor services offerings in the planning area all operate independently with no formal shared strategy for servicing visitors to the area (informal relationships exist). There are opportunities to work cooperatively, educate each other, and enhance visitor services so that visitors remain within the entire planning area longer.

- There are significant human resource challenges that need to be addressed, including available labour pool, staff skillsets and affordable/relevant and accessible training that are all critical elements to business success and the visitor experience. go2HR can be a valuable resource to assist in HR related plans and strategies. Affordable housing for employees and small business owners must also be addressed through policy tools (sharing economy bylaws, zoning enforcement) and various possible incentives/development charges on the private sector.
- There is a strong need to understand and manage environmental impacts in the West Kootenay/Revelstoke planning area and ensure the destination is managed for responsible, sustainable tourism growth.